

Funding Your Student Organization

A Summary of the Processes of the Student Budget Advisory Committee and Its Procedures and Guidelines

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About the SBAC

The Student Budget Advisory Committee (SBAC) is a group of seven members who are charged with the responsibility of fairly and justifiably disbursing a budget of approximately \$200,000.00 across all interested and eligible student organizations at Saint Joseph's University. The SBAC receives its funding from the Office of the Vice President of Student Life and is not technically considered a student organization in and of itself. It is more aptly identified as a conglomeration of various student leaders from the umbrella organizations of our campus – that is, the University Student Senate (USS), the Student Union Board (SUB), and SJU 'til 2. The Student Vice President for Financial Affairs of the USS chairs the committee, and is responsible for its overall functioning. He or she does not have a vote in the funding decisions of the SBAC, but provides background information and historical analysis of the student organization and its requests, additional insights, and the facilitation of an organized and objective atmosphere. The committee members include three elected USS Senators, who interview for their position and exhibit a strong interest in finance and budgeting, two SUB representatives, and one SJU 'til 2 representative. The representatives from SUB and SJU 'til 2 are meant to serve as a springboard to receiving funding from their representative umbrella organizations. Their background knowledge helps the committee to identify whether the requesting student organization is fulfilling existing campus programming needs. All seven committee members are intended to reflect the varying and diverse interests of our campus, and their votes should give consideration to this. An advisor, the Assistant Director for Campus Programs, serves as an aid to the committee and its chair in that he or she provides professional insights that may help the committee to be more cognizant of the grand scheme of the University.

Meeting Agenda

SBAC Meetings take place once a week, every week of the semester (with the exception of finals week). Their purpose is to discuss the state of the operating budget, hear student organization requests for supplemental funding, make decisions regarding the allocation of funds to student organizations, and review the activity of student organizations after receiving funding to determine decision reversals. Meetings may be cancelled in the event that inclement weather occurs or quorum is not obtained. Quorum is the minimum number of committee members that must be present to ensure the validity of the meeting's proceedings. A quorum of four members has been set for SBAC hearings. Meetings cannot occur without the chair of the SBAC present, except where permission is granted by the chair.

Committee Member Expectations

To ensure the effective functioning of the SBAC, each committee member has a different set of roles and obligations that he or she must fulfill. The following responsibilities apply to all members:

1. ATTENDANCE: Every committee member is expected to attend each meeting, and each member must provide a vote and rationale in making decisions regarding funds allocation. Absences are excused in cases of inclement weather, illness, unusual circumstances, or emergency. In the event that a committee member has more than three unexcused absences, he or she faces the possibility of being relieved of all duties to the SBAC. The advisor is expected to attend all meetings. In the event of his or her absence, meetings will continue to occur, but all major decisions must be discussed with the advisor.
2. CODE OF ETHICS: Ethical business conduct is an absolute necessity when working with the finances of student organizations at Saint Joseph's University. Each SBAC

member is held to the utmost degree of professionalism and care at all times, especially when making decisions regarding the funding of student organizations' requests. In situations where an SBAC member is a part of a student organization making a request, he or she is required to abstain from voting. As has been previously stated, each SBAC member is expected to remain objective in his or her thinking. Members are expected to be representative of the overall interests of the campus, not their own.

3. EDUCATION AND AWARENESS: SBAC members are expected to be fully knowledgeable and conscious of the workings of the student budget processes. Members should recognize the tremendous undertaking and responsibility they are charged with when they accept their role on the SBAC, and are expected to be able to educate and inform all student organization treasurers and inquiring parties regarding the processes of the SBAC.
4. SERVING AS A LIASON: Each SBAC member (with the exception of the Chair) is given the responsibility of serving as a liaison to one-sixth of the student organizations on campus. In this role, the committee member is obliged to maintain continuous and regular communication with his or her student organizations and provide financial education and assistance to the treasurer. During the Annual Budget Process, each committee member will be responsible for justifying the line items in their student organizations' Annual Budget Request Packets. After the completion of the Annual Budget Process, the liaison will personally write a rationale and explanation of why funds were granted and in what way for each of his or her student organizations.

In addition to these general expectations, individual responsibilities apply to each member.

Those responsibilities are as follows:

SBAC Chair: *USS Vice President for Financial Affairs*

1. Chair the SBAC and ensure its efficient operations. The Vice President for Financial Affairs of the University Student Senate will always serve as the Chair of the SBAC.

2. Appoint and retire members of the SBAC as the need arises.
3. Facilitate objective dialogue between members during meetings.
4. Maintain communication with all student organization treasurers regarding their budgets, the scheduling of hearings, and any funding decisions made.
5. Cast a vote in the event of a tie among the members of the SBAC.
6. Complete a summary of the Annual Budget Reviews conducted by the SBAC for submission to the student body, specifically the USS.
7. Represent the SBAC to the USS in the following cases:
 - a. Explaining an annual budget appeal submitted by a student organization;
 - b. Presenting an explanation and the state of the SBAC budget after any grant of funds greater than \$10,000.00 to one student organization's request, or in one day.
8. Ensure adherence to all SBAC rules and procedures. Exceptions can be made under extreme circumstances by vote of the SBAC.
9. Revise the written rules and guidelines of the SBAC as the need arises and serve as the final decision making authority in terms of procedural modifications.
10. Appoint non-voting members for purposes of increasing awareness about the workings of the SBAC and training new members to resume voting responsibilities for members who will be retiring from their duties in the near future.
11. Give a presentation to the Organizational Presidents Association (OPA) in February of each year explaining how to apply for an annual budget. In addition, he or she must offer non-obligatory training sessions in February on how to complete the Annual Budget Request Packet.
12. Maintain regular communication with the advisor to the SBAC.

USS Representative One: *USS Senator*

1. Keep electronic minutes of all SBAC Meetings and email them out to each committee member no more than 24 hours after the meeting.
2. Make revisions to the minutes as the need arises.
3. Serve as back-up to the Chair of the SBAC in cases of his or her absence.

USS Representative Two: *USS Senator*

1. Collect SBAC Additional Funds Request Forms every Friday at 5 PM from the mailbox of the Assistant Director of Campus Programs.
2. Make seven copies of each Additional Funds Request Form every week, and separate into each committee member's folder.
3. Assist the SBAC Chair in conducting training sessions during the Annual Budget Process.

USS Representative Three: *USS Senator*

1. Keep track of the remaining balance left in the SBAC budget after every meeting and crosscheck with the records kept by the Office of Student Leadership and Activities.
2. Before every supplemental funding hearing, check the annual budgets of each student organization to ensure they were not already given funding for the supplemental request.
3. Do a historical analysis of each requesting student organization to look at the percent of funds spent against the percent of funds allocated before each supplemental funds hearing.

SJU 'til 2 Representative

1. Provide insights on how an event can be integrated with SJU 'til 2.
2. Take funds back to SJU 'til 2 for their vote and approval when the need arises.
3. Provide assistance in any special projects conducted by the SBAC.

SUB Representative One: *SUB Treasurer*

1. Offer unique insights from a programming perspective as to how funds can be best allocated.

2. Take funds back to the SUB for their vote and approval when the need arises.
3. Provide assistance in any special projects conducted by the SBAC.

SUB Representative Two: *SUB Member*

1. Take funds back to the SUB for their vote and approval when the need arises.
2. Verify that any programs requiring additional funding have been approved by the Office of Student Leadership and Activities.
3. Provide assistance in any special projects conducted by the SBAC.

Hearing Eligibility

In order for a student organization to have a hearing for funding of its requests, both annual and supplemental, it must be an organization in good standing with the Office of Student Leadership and Activities. This means the organization must be a recognized student organization on campus and that all paperwork must be up-to-date, accurate, and complete. Any time organization officers change, a Change of Officer Form must be completed and turned in to the Office of Student Leadership and Activities.

Additionally, deadlines must be adhered to. A timeline of when paperwork must be turned in will be distributed with the Annual Budget Packets and posted on both the USS Website and the Office of Student Leadership and Activities website. Additional Funds Request Forms for supplemental funding must be turned in by 5:00 PM on the Friday three weeks prior to the week of the event or supplemental need. Student organizations that do not meet the written and posted deadlines will be ineligible to be heard for their requests.

Rules and Guidelines for Funding

1. All requests to the SBAC must be filled out completely and legibly.
2. Failure to arrive on time for the scheduled meeting may result in a 10% reduction in the granted budget.
3. Funding will not be provided for furniture or computers unless the organization has an office.
4. The SBAC will not fund membership dues for any national, general, or local affiliations.
5. The SBAC will not fund direct donations to charity or scholarships, but may grant funds to cover costs for charity fundraising events without expectation of reimbursement.
6. Requests, both annual and supplemental, must be specific. If the student organization is requesting money for an event, that organization must be able to provide quotes and cost estimates. Simply stating "decoration expenses" and writing a broad amount will not necessarily receive funding. Rather, citing the store you intend to purchase the goods from and the costs of the goods will increase chances of funding. Special consideration will be given for unusual cases.
7. Only recognized student organizations will receive funding for their requests. This means that student groups running out of other areas, such as the Office of Mission, are ineligible to be heard for requests. In some cases, an exception may be granted allowing the group's request to be heard, but the funding must be taken back to the USS, SJU 'til 2, or the SUB for approval. The SBAC cannot grant funding in this case.
8. In cases where food is required, a quote from Aramark must be attached to the request. If the organization does not wish to use Aramark for its event, that organization must obtain written permission from the Director of Catering at SJU for Aramark and present it to the SBAC during the hearing.

9. Do not request more money than you actually need. This allows for excess dollars to be left in all student organization budgets at the end of the year and ultimately leads to a large portion of funds going unused. Request what you need and be able to provide detail.
10. Because the SBAC is not technically a student organization, it cannot donate funds to any student organization.
11. Should a student organization have funds left over in lines where it does not need them, and want to reallocate those funds to a different line, it may do so under two conditions. Anything less than \$250.00 of any line can be reallocated at the discretion of the student organization's treasurer. The Chair of the SBAC must approve any reallocation of funds meeting or exceeding \$250.00. Written permission by email or letter must be requested, and both parties must notify the advisor of the student organization.
12. A maximum of \$500.00 will be funded annually for retreats. If an organization has specific needs in excess of \$500.00, they must be presented during the fiscal year via supplemental funding and will be considered.
13. A maximum of \$500.00 will be funded annually for conferences or registration costs. If an organization has specific needs in excess of \$500.00, they must be presented in detail during the fiscal year via supplemental funding. Exceptions for student organizations needing funding for summer conferences will be considered.
14. A maximum of \$75.00 will be funded annually for office supplies. Additional expenses must be covered during the fiscal year via supplemental funding.
15. A maximum of \$50.00 will be funded towards honorariums.
16. A maximum of \$20.00 will be funded towards postage. Specific events that warrant mass mailings will be given further consideration.
17. A maximum of \$500.00 will be funded for inclusive scholarship banquets or award ceremonies during the Annual Budget Process. If an organization has specific needs in

excess of \$500.00, they must be presented in detail during the fiscal year via supplemental funding.

18. Clothing and t-shirts will be funded, but only in cases where they are relevant to the functioning of the event. This means that t-shirts or vestments used for identification of event coordinators or those responsible for the event may be funded. But t-shirts that advertise or serve as gifts for participants will either be denied funding or deferred to the USS, the SUB, or SJU 'til 2.
19. The SBAC will not reimburse organizations for unauthorized funds already expensed by the student organization.
20. Athletic equipment is available from the field house for rental. Therefore, funding for additional athletic equipment will not be provided.
21. Transportation costs for trips, conferences, and retreats must be specific with quotes in order to be funded. Therefore, it is recommended that the student organization request these funds during the fiscal year instead of via the annual budget.
22. Hotel costs for trips, conferences, and retreats must also be specific with quotes in order to be funded. Therefore, it is recommended that the student organization request these funds during the fiscal year instead of via the annual budget.
23. The SBAC reserves the right to deny funding in the annual budget for any events scheduled for the spring semester of the fiscal year. This allows for more careful planning and more sufficient funding for the events planned in the fall semester.
24. The SBAC reserves the right to take back unused funds for fall semester events when they have not occurred, so long as they discuss the matter with the student organization before doing so to be sure that the event has not been moved to the spring semester.
25. The SBAC reserves the right to pull back unused funds from the current fiscal year's annual budget, so long as they confer with the student organization prior to doing so in order to ensure that the funds will not be used.

The Annual Budget Process

The Annual Budget Process begins in the spring semester when students complete the Annual Budget Request Packets. Blank packets can be obtained on the USS website, the Student Leadership and Activities Website, and in hard copy form on the Third Floor of Campion. There will be a presentation on how to fill out the budget packet at the first OPA Meeting of the spring semester. The budget requests should outline all the activities of the organization and the finances needed for the upcoming fiscal year. Annual Budget Request Packets must be turned in according to the budget timeline. Any budget turned in after the due date will be subject to the following penalties:

- Received up to week late: 25% Budget Reduction.
- Received later than a week: No additional budget applications accepted.

The six voting members of the SBAC will have served as liaisons to each student organization throughout the year, so their involvement in specific requests is heightened in the Annual Budget Process. Prior to submitting the Annual Budget Request Packet, but after filling it out, each student organization treasurer must meet with his or her assigned SBAC Liaison to discuss their annual budget request. In doing so, the SBAC Liaison will be able to make a case for that student organization's funding in the deliberations. Additionally, the SBAC Liaison will be able to help the treasurer of the student organization to catch any shortcomings or errors in the proposed annual budget prior to its submission. Following the submission of the budget packet, the SBAC will convene for a weekend retreat in order to review each of the budget packets, make its deliberations, and write its rationale for each request. The retreat typically takes place during the last weekend of March, but the budget timeline will outline the exact weekend of deliberations.

Several factors are weighed when making funding decisions (in no particular order):

- How funds have been used/misused in the past
- Overall feasibility of the request
- Financial feasibility of the request
- Number of people and who will benefit from the activity
- Co-sponsorship support provided for the activity
- Whether tentative or definite plans have been made for the event
- How detailed the information about the event is
- OPA Attendance: Two absences warrant a 15% reduction in the granted budget. Three absences warrant a 25% reduction in the granted budget. Four absences (all meetings in a semester) warrant a 50% reduction in the granted budget.

In addition to evaluating the activities and programs, the organization itself is evaluated. The SBAC looks at such items as:

- Number of active members of the group.
- Membership fees or dues charged to the club members
- Number of new members
- Group status (if a registered/recognized student organization)
- Copy of constitution on file with the Office of Student Leadership and Activities
- Copy of current officer list on file with the Office of Student Leadership and Activities

On the Tuesday following the SBAC's deliberation weekend at 11:30 AM, each student organization will be able to pick up a copy of their approved budget with explanations and rationale compiled by their organization's SBAC Liaison. A representative from each organization must pick up their budget from the Office of Student Leadership and Activities and sign off upon its reception. From the time the proposed budgets are made available to the student organizations, a representative of the group has five academic days to make a written

appeal providing additional information that could be of assistance in reaching the appeal decision. The SBAC will decide whether or not an appeal is granted, and if so, forward that appeal to the USS for their recommendation. Upon receiving the USS recommendation, the SBAC will deliberate a second time and give the appeal decision in writing to the student organization. That decision of the SBAC will be final.

The Supplemental Funding Process

The SBAC continues to allocate additional funds throughout the fiscal year until all funds are distributed. During the fiscal year student groups may request additional funds from the SBAC by completing the SBAC Additional Funding Request Form available online at the Office of Student Leadership and Activities website. The SBAC meets weekly to review all requests and will render its decisions to the student group within three days of the meeting. Requests of this nature will only be reviewed if submitted at least three weeks prior to the event or activity. All outlined rules and procedures apply in this process as well.

Auditing Procedures

Any recognized member of a student organization reserves the right to request an audit of the disbursements made by the SBAC to ensure proper adherence to the rules, guidelines, and ethics. The audit will be conducted by the Student Body President and the Director of Student Leadership and Activities, with the help of an appointed committee of auditors should they see it fit to appoint one. Until the audit is completed, no further allocation of funds can take place. The audit must be conducted before the next SBAC meeting to ensure the continual allocation of funds across student organizations.

Disclaimer

The SBAC reserves the right to make adjustments and changes where it sees fit, so long as an majority approval of the board members takes place. Questions, comments, suggestions, or feedback should be delivered to the Chair of the SBAC at sbac@sju.edu, or the Assistant Director of Campus Programs.