2015 - 2016
Eastman School of Music
Students’ Association
&
Office of Student Life
SA Spending Guidelines

Updated August 2015
Position of Treasurer

As your organization’s Treasurer, you have responsibilities to your group, the Students’ Association, and Office of Student Life. Your most obvious responsibility is to track the financials of your group. You are the leader in the group who should be most informed about your group’s budget and, in that position, it is important to keep your account information up to date. Even though the SA Treasurer and Office of Student Life are tracking all organization’s income and expenses, you should do the same. Once you request funds, you are responsible for what your group does with those funds. Please read the guidelines in this manual and become familiar with what is considered appropriate and inappropriate use of SA and University funds. It is important to be involved in your group’s activities so you know that the money is being spent responsibly. Here is a brief list of your responsibilities as Treasurer:

- Keep track of group expenditures and income. Your advisor and the SA Treasurer must approve any significant deviations from the submitted budget and your group’s mission.
- Maintain the respected name of the SA and The Office of Student Life by properly handling credit, promptly paying bills, and using courtesy and common sense.
- Keep complete and accurate records of your finances.
- Plan and present a budget, with your group, to the Office of Student Life and SA Treasurer after attending fall Leadership Training on or before September 10.
- Keep your Office of Student Life advisors aware of all planned activities well before their planned implementation.
- Submit all finance paperwork and requests at least 14 business days prior to the day they are needed. Check requests need a minimum of 30 days to process.

Overview of ESM Students’ Association (SA) and Office of Student Life (OSL)

The Office of Student Life is located in the Student Living Center, suite 103. The Assistant Dean for Student Life and Assistant Director serve as primary advisors to SA recognized student organizations, GSA, and the SA Executive Council. The OSL is responsible for the WISE program, New Student Orientation and EOC, Community Weekends, Student Conduct, Disability Accommodations, Senior Week, Yearbook, Title IX, Student Support, as well as planning campus wide events and programs that create community and enhance student life. The OSL provides support to student organizations through leadership development, student organization management, event planning, and financial management.

The OSL, with the assistance of the SA Treasurer, is responsible for managing the finances of the ESM Students’ Association in a way that is both fiscally responsible and in the best interest of the ESM student body. The ESM Students’ Association budget is funded entirely by the mandatory Student Activity Fee that each student contributes as part of tuition. For this reason, keeping and maintaining a vibrant and diverse co-curricular campus life is our top priority.

SA meets weekly to discuss issues of importance to students, to discuss the formation and approval of new student organizations, and to hear requests by student groups for supplemental funding to hold programs or purchase equipment not originally in a group’s budget. Each fall after leadership training, the SA executive board and OSL review budget requests and allocate funds to each eligible student group for the upcoming academic year. Budgets must be used within the academic year allocated and are active between September, after leadership training, and the last day of classes in spring.

When making a decision whether or not to allocate funding, the SA and OSL will consider the following factors:

- What is the benefit that ESM undergraduate students and the ESM campus community will receive from the funding?
- Does the program or event help to achieve and maintain a wide variety of experiences and activities on campus?
- Does the program or event contribute to cultural diversity on campus?
Approximately how many ESM students can participate in the program and what are the costs per person?
- Is the program unique and not duplicating the efforts of another group?
- Is there a need for the program or event?
- Are there similar events taking place or have similar events recently taken place?
- Are the program expenses reasonable and well justified?
- Are there other sources of funding available to the organization?
- Has the organization demonstrated success in previous programming attempts?
- Is the organization vibrant and active on campus?
- Is it open to all ESM undergrads and accessible to all ESM undergrads?
- Can the event be publicized widely and effectively enough?
- Is the program religious, political, exclusive, discriminatory in nature?
- Has the group previously received supplemental funding in the current academic year?

Office of Student Life Financial Request Forms: Fund Request Form
Nearly every financial transaction should begin with the Fund Request Form. These forms are located in the OSL. When you need to request funds of any kind for your group, fill out one of these forms and leave it for an OSL advisor in his/her office mailbox. Your advisor will pick it up and fill out the corresponding accounting paperwork for you. He/she will let you know when paperwork is ready.

Make sure you include the type of request you need (Wegmans Card, copy cards, blue requisition, requests for payment, reimbursement), your group’s name, the vendor, a “do not exceed” amount, a detailed purpose of the expenditure, the date by which you need the item, and your signature. Please be explicit about the purpose of the request; vague comments will only delay processing of your request. If you are vague, your advisor or SA Treasurer may return the request form or email you to ask for more information.

Wegmans Card
Wegmans Shopper’s Club for Business cards may be requested for use at Wegmans and Wegmans’ owned businesses. The OSL has 2 cards to be shared amongst all SA groups. In order to use a Wegmans card, the Treasurer must request funds using the Fund Request Form. As with other requests, please allow up to 7 business days for your request to be processed. The Treasurer is allowed to pick up the card from the OSL by signing it out of the Wegmans binder. The card must be returned by the end of business on the following day, with the receipt, and signed back in by the returnee. If taking the card on Friday, it must be returned by 10am the following Monday. DO NOT SLIDE THE CARD AND RECEIPT UNDER THE OFFICE DOOR AFTER BUSINESS HOURS! Groups who lose the card and/or fail to return the card by the due date and/or fail to turn in receipts risk losing card privileges.

Reimbursements
Reimbursements will only be permitted when no other structured purchase option was available, and prior permission to purchase using a student’s personal funds was granted. The SA is tax exempt; before shopping please come to the OSL to get a tax-exempt form. In order to be reimbursed, please bring the receipt to the Office of Student Life. Your advisor will fill out a Student Expense Report, which you will need to sign. It could take 2-3 weeks for you to receive your reimbursement. Students will not be reimbursed for items not related to their group’s event, or for alcohol, drugs, or personal purchases. Students are at risk of not being reimbursed if a receipt is not available.

312 Blue Requisitions
312 Blue Requisitions (“blue reqs”) are used with all internal University vendors, such as Dining Services, River Campus Graphic Arts Services, Bookstore, Transportation, the MAG, etc. You do not need to sign the requisition. After a blue req is requested, your OSL advisor will fill it out, sign it, and tell you when it is ready for pick up to give to the department. When using the blue req, the top blue copy is given to the department and the bottom yellow copy is for the OSL. You do not need to retain a copy of the req or obtain a receipt, although you should note the charge for your group’s records.
Requests for Payments and Check Requests
Check requests and Requests for Payment (RFP) are filled out and submitted directly to UR Accounts Payable by an advisor and have a net 30-day turn around time. They are used to pay invoices for goods and services and accompany all contracts for services rendered (see Contracts section). A check is requested by filling out the appropriate information on the Request for Payment Form. Your advisor will assist you with this. In most cases your advisor will even process the paperwork on your behalf.

Pay your bills promptly! The ESM Students’ Association has a good credit rating and a reputation for quick payment; we would like to keep it. If an invoice is mailed directly to the OSL, we may send you a notice to come in and fill out a request for payment. Please respond to these notices promptly.

Note: Anticipate your checks. Don’t expect to have the check the day you request it. Allow at least 30 days for a check request to be processed.
Please make sure you sign all check requests. Under “description/purpose”, please be specific in your explanation of what the check is for. If the check request is for an event, give the name and date of the event. Attach original copies of bills or invoices to your check requests. If you receive two copies of the bill, send both to the OSL. We keep one on file, and send the other copy with the check to ensure proper credit. Per UR Accounts Payable policies, checks will not be issued without the proper back-up documentation! Give the check request to your OSL advisor when you are finished filling in the proper information.

Use full names of people to whom checks are to being paid. Remember that we are tax-exempt. If the vendor includes tax on the invoice, exclude that amount when filling in the check request (you will need to follow up with the vendor to make sure you are being charged the correct amount minus tax and request a revised invoice showing the correct amount). If a merchant questions our tax exemption, we will send a tax-exempt form. If the check should be mailed out to a vendor, please provide the complete address and check the “mail out” box. If you have enclosures to accompany checks, paperclip them to the check request. If you wish to pick up the check yourself to pay the vendor at an event, check the “pick up” box. Performers and speakers are paid only after the service is rendered; usually checks are handed to them right after their performance or mailed directly. Checks payable to an individual require a W9 tax form to also be submitted with the request for payment. W9 forms are available in the OSL. If an individual has a W9 on file with UR within the last 12 months no other copy is necessary. Checks payable to a business do not require a W9.

**Deposits to your account**
When you’d like to deposit money into your SA budget account, see your advisor for assistance. Large sums of money collected at an event should be brought to the OSL and locked in the reception desk cabinet. You advisor will count the money, deposit it into your group’s account, and credit your budget accordingly. Money should never be kept in a student’s room or apartment.

**Contracts**
A contract is used for all performers, speakers, coaches, bands, instructors, etc. You can pick up a blank contract from your OSL advisor. After filling in the necessary information, give it to the artist/group/vendor to sign, and bring it to your OSL advisor to sign. You may also need to have the performer complete a W9 if the payment is being made to the individual, rather than to a business. All contracts must have signatures to be processed. When the contract has the proper signatures, bring the contract (and W9) to the OSL and fill out a check request for payment. Remember to check the pick-up box if you are delivering the check to the performer! If you want the check to be mailed, we will mail it to the performer after the event.

Once a contract is signed, it is binding. Therefore, if your group verbally enters into a contract, the group may be legally responsible to pay. Your OSL advisor must sign all contracts! Students are not legally permitted to sign contracts or enter into contractual agreements.

**Monthly Statements**
Each month the SA Treasurer can send a financial statement to the organization Treasurers. This statement gives the financial status of your group. It lists the total expenditures and incomes of your accounts, as well as giving a detail of each transaction. If your records do not agree with the statement, check with your advisor and the SA Treasurer.

**Supplemental Funding Process**
A sum of money, called supplemental funding, is set aside during budgeting each year that can be distributed to recognized SA groups by application process via the SA weekly meetings. This money is intended for use by SA recognized groups for legitimate expenditures that were not included or anticipated in the budget request submitted in fall. This may include unexpected equipment needs, new programs, or unique co-sponsorships open to all undergrad students. Money obtained through supplemental funding requests must be used within all ESM SA Funding Guidelines.

In order to obtain supplemental funding for your group, the first step is to consult your OSL advisor. This should be done as far in advance as possible before your group requires the funding. Once you have met with your OSL
advisor you will need to complete the appropriate Supplemental Request Form and obtain necessary signatures. Please be very specific when answering the questions asked on the request forms. Vague descriptions of program details will delay the process and does not make a very strong case for your request in front of SA.

When request forms are completed, you will need to attend a SA meeting where you will explain and justify your request and answer questions. SA may decide at the meeting whether or not money will be granted and how much, or ask you to present again the following week with additional information. The requestor should leave the room while the SA deliberates.

To appear at a SA meeting, make 20 copies of your completed request form and turn them in to the OSL or place them in the SA Treasurer’s mailbox in the OSL. This must be completed no later than 12noon on the Monday prior to the SA meeting you wish to attend. This is a firm deadline and no exceptions will be made. Requests that miss the deadline must wait until the next SA meeting. The extra time is required for all SA members to look over the request and to send it to a second meeting if the SA Treasurer feels it is necessary. Each type of Supplemental Funding is outlined in the following sections, and request forms can be found in the Office of Student Life.

**Program Supplemental Funding**

Program supplemental funding can be used to help offset the cost of a new or improved program, especially when the costs for the program were not included in the budget request submitted during the previous year. Program Supplemental Funding is used to obtain funding for group programs that meet all SA funding guidelines as described in this manual. Program supplemental funding is not to be used for the purpose of promotion of a specific organization. Programs should have the following qualities:

- Increase knowledge and awareness of a topic or group
- Attract, include, and be open to all members of the Eastman undergraduate student body, and not only those who are members of the organization
- Collaborate with other organizations on campus when possible

On the Program Supplemental request form, provide a detailed response for each field. Requests must be submitted 4-6 weeks in advance of the proposed event. Consult with your OSL advisor when requesting a program supplemental.

If a group is granted program supplemental funding at a SA meeting, the members in attendance at the meeting must fill out a Program Evaluation Form (P.E.F.) within 3 business of the event date and return it directly to the SA Treasurer. The purpose of this form is to allow SA to evaluate the use of Supplemental Funding and to ensure that the program was successful. A program for which Supplemental Funding is granted can be viewed as an investment for the SA, so the feedback tells us whether or not it was a good use of SA money.

**Equipment Supplemental Funding**

Equipment Supplemental funding can be requested in order to purchase necessary equipment that was not listed in the budget submitted during the previous year. Equipment is expected to last longer than three years. This type of equipment should not be included in budget requests; equipment supplemental funding is the only way that long-term equipment can be purchased. Equipment purchased through Supplemental Funding is the property of the Students’ Association, and should be inventoried, stored, maintained, and cared for appropriately. Equipment supplemental funding (or any other form of SA funding) may not be used to purchase clothing or uniforms or things that would be considered personal items (for example shin guards, socks, cleats...).

**Budgeting**

Budgets become active, and groups may begin using and requesting funds, after members attend the annual mandatory fall leadership training in September. This is also the time in the semester where groups may begin planning programs and holding meetings. Groups are responsible for preparing an annual budget request for submission during training, for the academic year. Budgets are submitted to SA Executive Board and the OSL
after training, then they are reviewed, approved, and activated. Treasurers and group executive board members must attend fall Leadership Training. Those who do not attend the mandatory training will not only have budgets frozen until they meet with the OSL and SA Executive Board, but also put their group at risk for budget cuts, probation, defunding, or de-recognition. Any budgets submitted after the allocation process has been completed may be subject to a budget reduction or become at risk of losing funding. Budgets this year are due on or before September 10.

**Tips for Treasurers**

**Do**

- Do form a good relationship with your OSL advisor and meet regularly
- Do read and understand this document
- Do process all invoices you receive promptly
- Do help maintain our good credit rating
- Do review statements and keep track of your organization's finances
- Do keep your organization informed of their financial status
- Do turn in receipts and other documents for all check requests
- Do train your successor and provide accurate records of your group's finances

**Don’t**

- Don’t let anyone else pick up your completed forms
- Don’t expect to have a check processed the day you turn in the request. Allow at least 30 days’ notice for all check requests to be processed through UR Accounts Payable
- Don’t use nicknames when ordering checks; use the proper legal name
- Don’t keep an invoice. Turn in all copies with the check request. Keep a copy for your records after processing
- Don’t pay taxes of any kind as we are exempt from state and local taxes
- Don’t charge a fee for admission to an event without going through the OSL. All events using tickets for admission must be handled through the OSL
- Don’t plan any events during reading period, juries, or finals week. Talk to your OSL advisor if you do plan an event such as a study break
- Don’t plan events before leadership training
Don’t expect your OSL advisor or the SA Treasurer to complete requests the same day. Always allow at least 7 business days

**Students’ Association Glossary**

**Academics** – SA funds will not be used toward any activity where academic credit is granted. SA funds will not be used to fund organizations, ensembles, performers, musical groups, instruments, musical equipment, sheet music, or other similar initiatives that infringe on and/or compete with the academic mission or curriculum of the Eastman School of Music.

**Advertising** - There must be advance and sufficient campus-wide advertising for all activities. Programs and events must be advertised at least 2 weeks prior to the event or program. All organizations that receive funds from the SA must include the following statement in their advertising: “_______ is SA funded”. This statement should be printed in an appropriately sized font so that it is clearly visible. All other groups should publicize their events as: “_______ is SA Recognized.”

**Alcohol and Other Drugs** – SA will not fund the purchase of any drugs, including but not limited to alcohol and tobacco. The only exception for funding alcohol is through the use of the Senior Fee for Senior Week events. Event publicity may not include logoed images of alcohol or other drugs, nor directly reference alcohol or other drugs. Publicity may include wording such as, “Drink specials available for those 21+ with government ID,” or “Drink specials available for those 21+ with government ID.”

**Approval of Events** – Any special event not budgeted for must be approved through program supplemental funding. Supplemental requests must be presented before the SA at least 4-6 weeks in advance of the event. All proposals should be submitted via the Event Registration Form online.

**Assessment Period** – If a SA group is not adhering to SA policies and funding guidelines, then SA Executive Board or the OSL may place the group in a probationary period. During this period, the group may be asked to provide monthly reports to their OSL advisor about their activities, address how many people are attending their meetings and events, and any other information the SA or the advisor deems necessary.

**Banking** – All SA funded groups’ banking and finances must go through the OSL. Due to logistics and liability, it is strongly recommended that Greek organizations do not maintain off-campus bank accounts.

**Charitable Events and Donations** – Charitable events and other fundraisers will not be subsidized or funded in any way with SA or University funds, as students may object to their money going to sponsor an event for a charity of which they disapprove. If a group would like to hold a charitable event, they must first meet all their expenses with income collected via ticket revenue or donations. Only those funds remaining after expenses are eligible to be donated (REVENUE - EXPENSES = DONATIONS). All publicity must include a statement of, “Proceeds to benefit ____.” There must be a sign prominently displayed at the event with such notice. The organization should consult with their OSL advisor far in advance of planning such an event.

***Unless gifts or donations are intended to directly support Eastman, we cannot issue receipts for tax purposes on behalf of other organizations, and it would be illegal to do so. If a donor does expect a receipt for tax purposes, they should be encouraged to give to the specific organization directly and not through your student group. If the person making the donation is expecting a formal acknowledgement of their gift, such as a thank you letter, they should instead give to the organization directly, instead of giving the donation to the student organization. Charitable organizations aren’t obligated by the IRS to provide tax receipts for gifts less than $250. Most do, because it’s the right thing to do, but acknowledgement procedures can vary from organization to organization.

Items that are purchased and used to raise additional funds for the organization will not be funded.

**Coaches** - In determining whether an organization may be funded a coach, it must be decided whether their
PRIMARY purpose as a whole is to compete. Coaches will be defined as an *outside individual who trains a team for the primary purpose of competition*. SA will fund ½ of the coaching fees, not to exceed $200.00 per semester.

**Conferences** – SA will consider funding academic year conference attendance for groups up to $100 per person for a max of up to 4 people. The conference must be directly related to the group’s mission and help the group grow and be more successful. Please talk to your advisor to ask about other possible opportunities for funding for groups or individuals to attend a conference during the academic year.

**Contracts** – Contracts are required for an organization to retain any paid or unpaid speaker, instructor, coach, band, DJ, etc. Any contract must be approved and signed by an OSL Advisor. No payment will be made without a completed contract with appropriate signatures and an accompanying W9 form. This helps ensure that both parties understand and fulfill their obligations. Students are not permitted to sign contracts or enter into contractual agreements.

**Concerts** – SA will not fund or support concerts on campus as student life programs if they conflict or compete with the academic missions. Such events put additional strain on already over-stretched room resources, and can contribute to over-use or injuries for students.

**Corporate Sponsorship** - Student Organizations are not allowed to accept any form of corporate sponsorship (for example product giveaways, coupons, and financial contributions) or to fundraise without *prior* approval from the Office of Student Life.

**Debt & Loan** – SA cannot provide loans and funds cannot be used to offset debt.

**Dues** - Groups organized for specific personal outlets (e.g. a Creative Arts Club, Soccer Club, Chess Club) may be subject to a dues requirement of $10 per member per semester. This can be raised through collection of dues from all members annually. Please consult the Office of Student Life and SA Treasurer for more information.

**Entrance Fees** – As a general rule, events that cost more than $1,000 must sell tickets. Exceptions to this may be considered (particularly in respect to annual traditional community weekend events). ESM undergrads must always be charged the lowest ticket price to SA funded events. If a SA sponsored event is free for ESM undergraduates, but open to faculty, staff, graduate students, or guests, they must be charged a higher entrance fee (and it is advisable to charge full face value). It is strongly recommended that the ticket price for non-ESM undergrads is the full per person cost and not subsidized using SA funds. River Campus guests are treated as general public or the same as ESM faculty/staff.

**Discriminatory Organizations** – Discriminatory organizations will not receive SA funds. Any organization found to be in violation of the University’s policies on discrimination risk de-funding and/or de-recognition. Furthermore, because every undergraduate pays the mandatory Student Activity Fee, all SA funded activities, meetings, and events must be open and accessible to all undergraduates. More information on the University’s policies on discrimination is available at [https://www.rochester.edu/working/hr/policies/pdfpolicies/106.pdf](https://www.rochester.edu/working/hr/policies/pdfpolicies/106.pdf)

**Exclusive Organizations** - Exclusive SA organizations, such as fraternities, sororities or other groups whose membership is not open to all undergraduates, will not be eligible for funding. Such groups will, however, be eligible for supplemental program funding specifically if the proposed program is focused on community service activities, and/or is open to all Eastman undergraduates (fundraising events are not considered “community service activities” and will not be funded). Fraternity/sorority rush and recruitment events (even if open to all), as well as chapter dues, will not be funded with SA funds. These organizations will be eligible for up to $60 per semester for light snack food for general interest meetings.

**Films** – All films shown by SA organizations must be approved in advance by the OSL. If a film is shown in the SLC TV lounge, Director’s Dining, or Ciminelli Lounge, it may only be publicized to residents. If a student organization would like to show a film to the larger campus community (i.e. in Hatch Recital Hall), then the group must purchase the rights to the film and can publicize widely on campus (this is regardless of whether or
not there is an entrance fee being charged). Please consult your OSL advisor in advance of showing any film on campus.

**Fines** - Fines for parking or traffic infractions, or for any other illegal actions will not be funded.

**Fiscal Responsibility** - Student organizations are held responsible for their accounts and are accountable for the funding they receive. Student organizations must repay any debt incurred. Any misappropriation of funds or use of funds outside these funding guidelines may result in sanctions on the organization and individual students involved, including but not limited to disciplinary action via the student conduct system.

**Food** – The SA will not fund food for the exclusive consumption of group members. Food is not to be purchased for the sole purpose of generating attendance at events, recruitment, or as the sole focus of the event. Food cannot be funded if the food will be sold for profit. In order to be approved to use SA funds on food, food must be an integral component to the success of the event itself (for example, a dinner banquet during a campus wide Etiquette Dinner). Food will be funded if it is an integral and major component to a cultural activity. Free meals, where there is no other meaningful event component, will not be funded. Novelty food giveaways such as for stress-busters, community builders, monthly themes etc…(such as ice cream, donuts, or other fun foods) will be considered with pre-approval from the Office of Student Life. Events with a catered meal (a breakfast, lunch, or dinner with a set menu and per person cost) will be ticketed and charged an entrance fee. Income will be collected in advance through ticket sales in the Office of Student Life. The following guidelines regarding food shall be strictly enforced:

- General Interest meetings – Up to $60 per semester is allotted for light snack food at general interest meetings for all recognized student organizations.
- Speakers and special guests– The SA will pay the cost of a speaker’s or special guest’s meal. Any SA members accompanying the guest shall be responsible for their own expenses.

**Funding Priorities** - High priority for funding will be given to co-sponsored events. These types of events involve two or more student groups working toward a common goal. These types of events produce greater results when it comes to such things as, attendance, marketing, and overall satisfaction. Another high priority for funding is on-campus events. These events increase the quality of student life on-campus and build campus community. Funding priority will also be given to events that will establish history and traditions on campus. Programs and events that are for members only will not be funded.

**Gifts** – The SA does not fund gifts, including gift certificates or gift cards. Money for this purpose must be acquired through fundraising or by soliciting donations.

**Giveaways** – SA funds can be used by groups to purchase small quantities of reasonably priced promotional items annually as a means for the group to raise awareness and recruit members. Items that are purchased and used to raise additional funds for the organization will not be funded. SA Funds can be used on giveaways if the items in question are integral to a specific campus wide traditional event and/or will enhance the overall experience of the event. The Office of Student Life has several catalogues from which students can get ideas. Your advisors work with a few select approved vendors who can provide pricing. If you are interested in creating a giveaway, please speak with an advisor in the Office of Student Life.

**Honorariums** – SA funds cannot be used to pay an honorarium for any UR/ESM faculty or staff member who serve as a speaker at an event. SA funds can be used to pay an honorarium to an off-campus speaker.

**Instructors** – In determining whether an organization may fund an instructor, it must be decided whether the organization’s PRIMARY purpose as a whole is to teach and spread knowledge of their art. Instructors will be defined as an individual whose primary purpose is to teach and spread knowledge of an art form without the intent to compete. SA will fund ½ of the instructing fees, not to exceed $200.00 per semester.

**Intercollegiate Teams** – SA will pay up to ½ of the team’s expenses, and the team must raise the rest of their needed funds.
Inventory Lists – All equipment purchased with SA funds in the possession of a SA organization belongs to the Students’ Association. However, the responsibility falls upon the individual organization to maintain accurate inventory lists of all property in this possession. Inventory lists must be submitted with each new budget request. No organizations will be considered for budgeting or equipment purchases until an inventory list is submitted to the SA Treasurer. Equipment purchased with SA funds must be stored on campus.

Libraries – Libraries will only be funded if the organization can demonstrate that the library material is integral to its functions. Literature that is available through the University library system will not be subsidized. All SA organization library materials shall be recorded as inventory. Sheet music will not be funded, nor will magazine subscriptions.

Merit – Groups deemed not in good standing with the Office of Student Life and/or Academic Affairs will not be funded, and risk de-recognition.

Mission and Purpose – SA funds should be used to support activities and programs that align with a group’s unique mission and purpose. While we encourage creativity in programming, random social functions that are unrelated to an organization’s mission or purpose may not be funded. Social functions and events that duplicate or compete with another group’s programs or mission will not be funded.

New Groups – The SA will not reimburse any expenses of a new group prior to SA approval for funding eligibility. There is a small leadership fund available for interest meetings through the OSL. Newly recognized groups may apply for Program Supplemental Funding and if eligible for a budget, may propose one during the next budgeting cycle.

Off-Campus Events – The SA will not fund events held off-campus if the event is inaccessible to students. The SA will not fund events off-campus if the event is not open to all students. SA funded groups sponsoring off-campus events must provide and pay for University sponsored transportation to and from the event. To manage risk and reduce liability, SA funded student groups organizing a sponsored trip off-campus may not use personal vehicles to transport students to/from events. Groups should use their budget to pay for UR chartered bus transportation. If a student group chooses not to use their funds to provide transportation, then the event is at risk of being cancelled. Consult your Student Life advisor on chartering bus transportation. Buses average $80/hour.

Paying Students – Students will not be paid for their services relating to the normal functioning of their group’s activity. Students are expected to donate their time and work to their SA organization.

Political Organizations or Political Activities – SA funds cannot be used to fund student organizations that are political in nature, nor can they be used for political activities, campaigns, a candidate or to influence legislation. SA funds, via a Program Supplemental, can be used to fund a political forum or debate or other program at which many different viewpoints are expressed. SA funds can also be used to fund non-partisan and voter registration events, as well as events that are grounded in civic engagement. These organizations will be eligible for up to $60 per semester for light snack food for general interest meetings.

Pre-professional Groups – Recognized pre-professional groups may apply for Program Supplemental funding for events that are open to all undergraduates. The general membership of pre-professional groups may be comprised of both grads and undergrads. However, their elected leadership positions may only be held by ESM full-time, matriculating undergrads. These organizations will be eligible for up to $60 per semester for light snack food for general interest meetings.

Prizes and Awards – The SA will not subsidize trophies or any similar type of prize without prior approval of SA Executive Board and the OSL. Awards may be considered for funding if the competition is open to the entire undergraduate student body.
Printing and Artwork – All SA organizations may use (and are encouraged to use) their SA funds to pay for the services of the River Campus Graphic Artist or another professional to design their posters, banners, brochures, logos, etc.

Publications - Only publications of organizations whose sole purpose is that publication shall receive funding, unless SA approves a one-time special project. Newsletters of organizations will not be funded. Each publication group may be funded for up to two issues per year, to be distributed by November 15th and April 15th.

Reimbursement – Reimbursements are not guaranteed and should only be used as a last resort for purchases. Only under special circumstances will the SA reimburse any student or SA organization. Any organization that incurs expenses upon the SA without prior approval may have their funds frozen until the amount is repaid in full.

Religious Organizations or Religious Activities – SA cannot be used to fund student organizations whose mission is to support religious ideologies and religious communities. SA funds, via a Program Supplemental, can be used to fund a multi-faith forum, debate, or other program at which many different viewpoints, ideologies, and identities are expressed. Religious student organizations will be eligible for up to $60 per semester for light snack food for general interest meetings.

Request for SA Council Action – All requests for SA Council action, such as Supplemental requests, must be submitted in writing and 20 copies placed in the SA Treasurer’s mailbox no later than 12 noon on the Monday before the Thursday night SA meeting at which the organization wishes to appear. No exceptions will be made to this rule; please plan accordingly.

Retreats – The SA will not fund leadership or planning retreats for individual organizations, as these events would not be open to all students.

Retroactive Requests – The SA does not grant retroactive funding or reimbursements. All requests for funding must be made prior to expenses being incurred.

Scholarships – SA funds cannot be used to fund scholarships of any kind.

Testing and Certification – SA will not pay any costs relating to testing or certification of group members, including travel costs.

Tickets – All tickets are to be sold through the OSL. Tickets should be sold with the lowest price for ESM undergraduates and a higher price (or face value) for all others. If there is to be a different price at the door, this must be advertised. All tickets, including collected stubs and unused tickets, shall be retained for a period of two years following the date of the event. All organizational income (and expenditures) should have complete documentation to support each income or expense posting to your organization’s monthly statement, thus providing a complete paper trail in the event of an audit. After the event, a P.E.F. must be filled out and submitted to the SA Treasurer within 3 business days of your event.

Treasurers - Treasurers are responsible for all financial transactions of their SA organization. Only the Treasurer is authorized to manage their group’s money and request funds.

Uniforms and Clothing – The SA does not fund T-shirt sales or other clothing as fundraisers or as promotion or for groups, nor does it subsidize uniforms for groups. Groups hoping to purchase t-shirts or uniforms must raise the funds or elicit sponsorship to cover the expenses. Exemptions to this are t-shirts or other clothing items for annual, traditional campus events or community weekends where the majority of all undergrads have an equal opportunity to receive the item.

Unused Funds – Funds must be spent in a given academic year (between September and last day of classes in spring). Funds that are not spent in a given academic year will not carry over into the following academic year. Funds cannot be used over the summer.
Program Supplemental Request Form

NOTE – This form must be handed in to the OSL no later than 12pm (noon) on the Monday prior to the SA meeting that you wish to attend, 4-6 weeks prior to your event.

Program
Name of Group(s) hosting the event: ____________________________________________________________

Amount Requested $______________ (please include a breakdown of event budget including expenses and income)

Group Membership Data (# active/ # inactive members/leaders) ______________________________________

Title of Event: ____________________________________________________________________________

Location ______________________________________ If on-campus, space already reserved? (Y/N) ____

Expected Attendance: Undergrad _________ Grad _________ Other _________

Description of Event (attach another sheet as needed):
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________

Have you planned a similar event in the past? (if yes, please give a brief description, attendance, etc)
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________

How will the program enhance undergraduate student life and contribute to the Eastman campus community?
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________

What is your marketing and publicity plan?
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
### Expenditures

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<tr>
<th>Items</th>
<th>Anticipated Cost</th>
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**Total Expenditures** $__________________________

### Income

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<th>Anticipated Income</th>
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**Total Income** $__________________________

**Total Request (Expense – Income)** $__________________________

---

**For SA Exec and Office of Student Life Use:**

**Approved:** Yes  No  

**Amount:** ________________________________

**Conditions:**

---
Equipment Supplemental Request Form

**NOTE** - 20 copies of this form must be handed in to the OSL no later than **12pm (noon)** on the **Monday** prior to the SA meeting that you wish to attend. Equipment cannot be purchased before getting approval. Use additional paper as needed.

Group Name: ____________________________ Amount Requested: $___________________

Describe and list all equipment being purchased:

Justification for the equipment purchase:

How will you manage the use of the equipment (i.e sign out, deposit, etc...)?

What will be the primary use of the equipment and how often will it be used?

How and where will this equipment be stored and maintained? How long is this equipment expected to last if cared for properly?

If applicable, how will you ensure that group members using the equipment have been properly trained?
### Required Price Comparisons

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<tr>
<th>Vendor</th>
<th>Amount</th>
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### Required Signatures

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<th>Role</th>
<th>Name (printed)</th>
<th>Signature</th>
<th>Date</th>
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<tr>
<td>SA Treasurer:</td>
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<td>OSL Advisor:</td>
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<tr>
<td>Treasurer:</td>
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</table>

### For SA Exec and Office of Student Life Use:

Approved: Yes  No  
Amount: $_________________________

### Comments from Advisor:

### Comments from SA Executive Board:
Conference Supplemental Funding Guidelines

If members of your organization are interested in attending a conference, please speak to your OSL advisor. Please note that some requirements and conditions must be met in order to obtain conference supplemental funding:

- Students may be eligible for conference supplemental funding during an academic year (September 1 through May 1). Summer conferences will not be funded.
- The same SA group may only receive this funding once every other academic year.
- An individual student may only receive funds once per academic year.
- The conference may have a maximum of 4 attendees from the same SA group. More than 4 members can attend if the group agrees to divide the max amount amongst more members, thereby reducing the total amount of money being dispersed per student.
- When granted, conference funding will be provided on a reimbursement basis only when paying for registration fees in advance is not feasible.
- If a student receives funding from another source, or intends to apply to other sources for funding to cover any portion of travel or participation in a conference, it must be noted on the supplemental form.
- Individuals who seek financial support for conference attendance through Conference Supplemental Funding are required to provide information detailing all anticipated expenses for the event. Additionally, applicants must include a thorough list of funding sources, to include any money received from scholarships or departmental grants, and personal funding sources with their itemized expense listing.
- Funding cannot be used to attend a conference as part of a job search or job fair at a conference.
- Students maybe denied funds to attend a conference they have previously been funded for through this supplemental funding process. Exceptions may be granted if the student is an accepted presenter or speaker at subsequent conferences.
- Funding to attend a national conference will not be granted when there is a regional conference opportunity available instead.
- The Students’ Association reserves the right to deny funding to any student who is not in good academic or conduct standing with the University.

Funding applicants will be grouped into 4 categories with invited speakers or presenters getting first priority, accepted presenters next and so on until all eligible applicants have been considered:

**Invited Speaker ($300 max award)**
Invited speakers are students who were contacted and issued a written invitation by a conference professional organization or association to speak at or present in their field of study at a conference, or a student appointed by an administrator as an official institutional delegate at a conference. Please submit the letter of invitation or documentation of appointment and a copy of the conference registration form with your application.

**Accepted Presenter ($200 max award)**
Accepted presenters are students who submitted papers or work that has been accepted for presentation at a conference. Please submit a letter of acceptance and a copy of the conference registration form along with your application. If applying as an accepted presenter who has submitted a paper or presentation for consideration, but confirmation has not yet been received from the conference, please submit your application prior to the deadline date and forward you
acceptance letter as soon as it arrives. Consideration is only given to applications received prior to the deadline date.

**General Attendee ($100 max award toward registration fees)**

General Attendees are those students who are members of a recognized SA organization in good standing and are attending a conference for that specific organization.

All applicants must submit the following to SA Exec and the Office of Student Life along with the Conference Supplemental Funding Request Form:

1. An explanation of your representation status per the descriptions above;
2. A copy of the conference registration form;
3. A copy of the conference brochure and schedule;

Upon return from the conference each student must turn in to the SA Executive Treasurer and the Office of Student Life a 1-3 page paper detailing what was learned at the conference, how it will benefit the organization, how it benefited the student leader in attendance, and how it will benefit the campus community.

Student who receive funding and attend a conference will also need to give a formal presentation to the SA Council on their conference experience, what they learned, how it will help them as leaders, how it will help their organization, and how what they learned and experienced will be brought back to campus to enhance the undergraduate campus community.
Conference Supplemental Fund Request Form

Name of Group Requesting Funds: ____________________________________________________________

Name of Group Member: __________________________________________________________________

Amount Requested: ______________________________________________________________________

Conference Name & Description: __________________________________________________________________________

Conference Date(s): ____________________________________________________________________________

Conference Location: ____________________________________________________________________________

Number of Attendees: __________________________________________________________________________

Means of Transportation: _________________________________________________________________________

Please answer the following questions in detail and attach to application:

1. Why do you feel you and your group will benefit from attending this conference?
2. What skills or learning opportunities will you and your group members gain at this conference
   that would not otherwise have been able to you?
3. How will you and your group be able to contribute more fully to the campus community and
   student life after attending this conference?
4. Please include any other information you feel relevant to the request, including a full
   breakdown of expenditures.
5. Please list any potential other means of funding this conference.

SA Treasurer: _____________________________________________  __________________________
               Name                                                Signature                               Date

Advisor: __________________________________________________  __________________________
         Name                                                Signature                               Date

Treasurer: __________________________________________________  __________________________
           Name                                                Signature                               Date

Advisor/SA Exec Comments: