

Undergraduate Student Government



at Michigan Technological University

## 2017-2018 Student Activity Fee Funding Policies and Procedures Informational Manual

Authored by Joshua Davis and Reviewed by the 2016-2017 Ways and Means Committee, Consisting of:

Joshua Davis, Chair  
Samuel Casey  
Melanie Thomas  
Joey Heltsley  
Max Sexauer  
Daniel Henderson

This Manual May be Found in the USG Office, Located in the MUB, and online at

<http://usg.mtu.edu/usg/ways-and-means>

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## ***General Overview of Student Organization Funding***

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### **What is the Student Activity Fee?**

- Per Chapter 8 of the *Board of Trustees Policies and Procedures Manual*, The Student Activity fee is a \$60 fee for undergraduate students, and a \$50 fee for graduate students, which is assessed under the authority of the University President in each of the fall and spring semesters. This fee where the money that supports student organizations comes from.

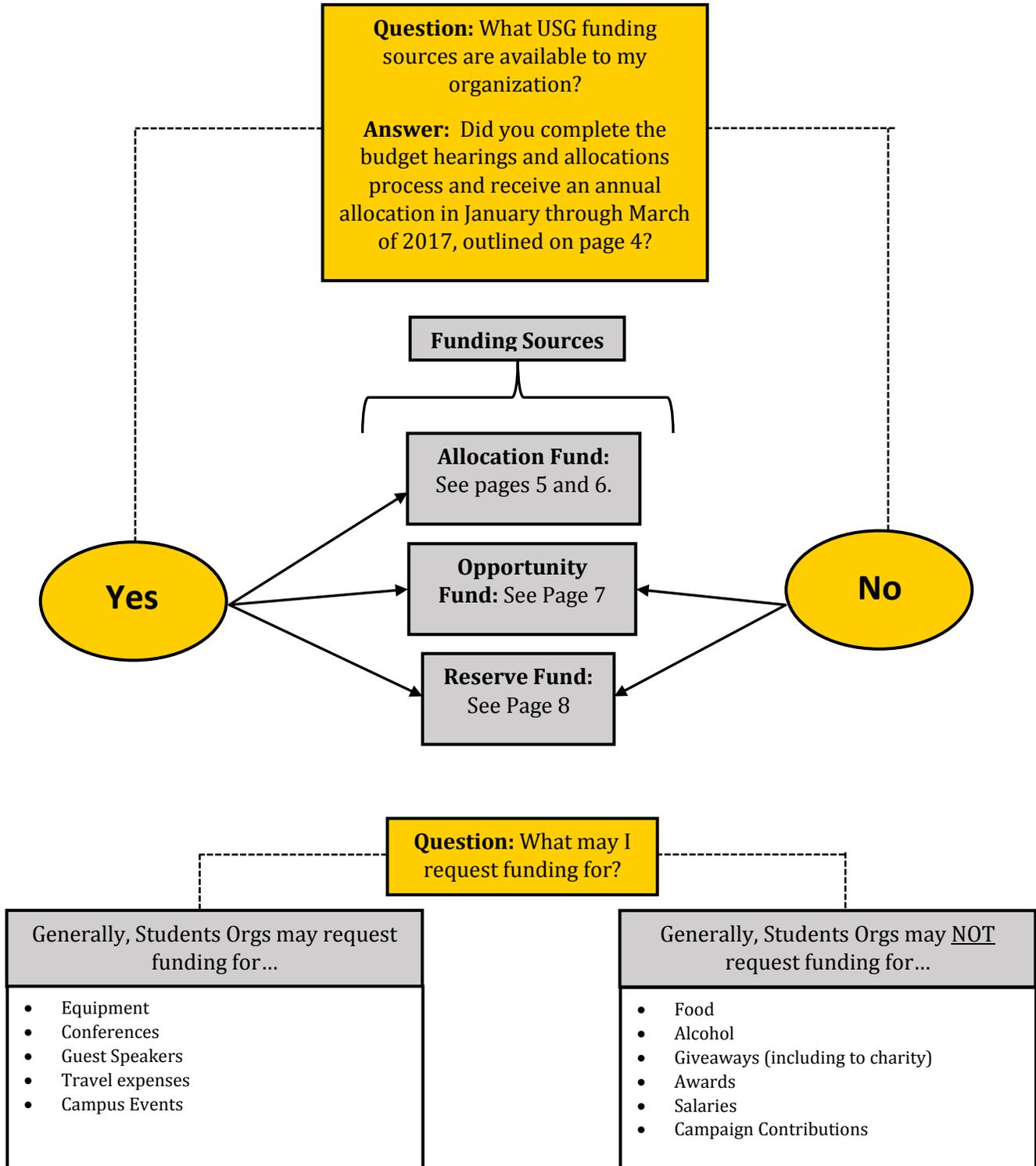
### **Who Manages the Funding Process?**

- The Ways and Means (WAM) Committee is a committee within USG that is tasked with the management and allocation of roughly half of the Student Activity Fee. The committee is under the general direction of the USG Treasurer and the *Coordinator of Registered Student Organizations* within the *Student Activities* office. The WAM committee consists of six elected USG representatives.
- The other half of the Student Activity fee is allocated once per year by a joint student – staff committee.

### **Where Does Our Authority Come From?**

- Direct authority over the disbursement of Student Activity Fee Funds by the Undergraduate Student Government, in collaboration with the *Vice President for Student Affairs*, is granted by Chapter 8 of the Michigan Tech Board of Trustees Policies Manual, effective April 27, 2012.
- Beyond the general guidelines outlined by the Board of Trustees, the policies relating to SAF funding are outlined in the *Undergraduate Student Government Constitution* and its Bylaws. This document attempts to summarize these policies.

## Student Activity Fee Funding Quick Reference



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## *Applying for Funding through the Annual Allocation Fund*

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### Requirements for Funding – Yearly Allocations

#### 1. **Be a Registered Student Organization**

- SAF funds are allocated to registered student organizations only. This means that students must be associated with a registered student organization in order to utilize SAF funds. A registered student organization is an organization which has properly completed the registration requirements as defined by the Student Activities office, and is in good standing with said office.
- In order to receive SAF funding, organizations must be "open" as defined by Student Activities. This generally means that your organization must have open membership to all students of Michigan Tech, and events funded by USG must be open for any student who may want to participate.

#### 2. **Apply For An Allocation**

- Student Organizations must complete several steps in order to be considered for an SAF allocation.
  1. Attend the mandatory budget information session held in early January.
  2. Complete the required budget packet in mid-February.
  3. Sign up for a budget hearing time slot in mid to late February
  4. Give a presentation to the Ways and Means committee, describing your organization, the items your budget, your goals, purpose on campus, etc.
- The Ways and Means committee will then announce recommended allocations to student organizations.
- Allocations are blanket allocations, and may be spent on any item (and only items) listed on your submitted budget, unless we note specific requested items which are disallowed.

#### 3. **Appeal Your Organization's Recommendation (If Necessary)**

- Student Organizations who feel they have a legitimate reason to receive a higher allocation than the Ways and Means Committee recommends have the right to appeal both to WAM and to the USG body as a whole.
- In late March, the USG body will vote on final allocation amounts for the next school year

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## *Distribution of Funds (Allocation Fund)*

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Once your organization has received an SAF allocation, there are two ways that you may utilize allocated funds:

### **Regular Reimbursement**

- A regular reimbursement takes place when a student organization fills out a *reimbursement form* for the amount they are requesting. A reimbursement implies that with the form, the student organization will also be attaching appropriate documentation (e.g., receipts) with the request, since the applicable items, events, etc. have already been paid for.

### **Advance of Funds Request**

- An advance of funds request takes place when a student organization fills out an *advance of funds* form for the amount they are requesting. With this form must be submitted proof of the costs of the future purchases to take place. As this is an advance, student organizations are not required to turn in receipts until they have used the SAF funds to make their purchase.

### **Once the Forms Have Been Turned In...**

- Forms will be reviewed by WAM. Once approved by WAM, the requests are approved by the USG body in a blanket approval that takes place weekly.
- After approval by the USG body, one of two things will happen:
  1. The USG treasurer will make out a check request for the student organization. The University will then send the student organization a check.
    - Checks are delivered to the Student Activities office. Once your check has arrived at the office, student organization treasurer (as listed on *involvement link*) will receive an email letting them know there is a check waiting for them.
  2. The USG will directly pay University departments for Student Organization purchases, as opposed to making out a check.
    - This is particularly common with van rentals. If your student organization wants to rent a van from the Michigan Tech motor pool for travel, USG will most likely pay for the van directly.
- If for some reason WAM or the USG body does not approve a request, the person listed as the treasurer on the request form will be contacted. This can happen because:
  - You did not provide adequate documentation.
  - The items on your request were not on your budget.
  - The items on your request are on the list of non-fundable items (see next page).
  - There is a clerical error on your form.
  - You have insufficient funding remaining in your allocation.

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## *Distribution of Funds (Allocation Fund) – Continued*

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### **A Couple of Important Notes on Funding**

#### **The Non-Fundable List**

- USG Generally does not allow SAF funds to be used for:
  - Food (*exceptions may apply at the discretion of USG*)
  - Alcohol
  - Giveaways
  - Awards
  - Salaries
  - Campaign contributions
  
- In addition, USG generally does not reimburse staff members for activities they may participate in with student organizations, unless special circumstances apply. A student must have paid a student activity fee (graduate or undergraduate) in the semester in which their organization is requesting an advance / reimbursement in order for that request to be honored.
  
- Per the USG constitution, USG will not reimburse student organizations for events that took place four months prior (or longer) than the date they submit the request. This is to keep the large volume of requests received at the end of each semester manageable.

#### **Additional Policies and Suggestions**

- It is suggested that large organizations who spend money frequently throughout the year submit requests at least monthly to ensure timely processing of those requests. Submitting one large request at the end of a semester is NOT recommended.
  
- Student organizations who are traveling must follow the guidelines outlined in the *Student Activities Travel Policy*. Information is found at <http://www.mtu.edu/student-activities/student-orgs/travel/>.
  
- Student organizations should keep their involvement link updated with current members in order to remain in good standing with USG and Student Activities.

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## *Additional Funding Sources – The Opportunity Fund*

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### **Opportunity Fund**

- The opportunity fund is money set aside for student organizations for "something new". The steps for receiving an opportunity fund allocation are:
  1. Be a registered student organization with Student Activates.
  2. Fill out an *opportunity / reserve funds request* form.
  3. Come give a "pitch" to the ways and means committee.
- WAM will then make a recommendation to the USG body, who will then vote on your request.
- If you receive an allocation – it is just that, an allocation. In order to actually receive funds, you must fill out a reimbursement or advance of funds form like any other organization receiving an SAF allocation.
- The opportunity fund is entirely separate from the yearly SAF allocations that are granted to student organizations each March. What your organization received in SAF allocation has no impact on opportunity fund requests.

### **Opportunity Fund Guidelines and Requirements**

- Student organizations are not required to have received an SAF allocation to apply for an opportunity fund allocation.
- The opportunity fund may only be used for items NOT already on your organization's budget which was submitted for budget hearings.
- A representative from your organization is required to "pitch" to WAM in person in order for your request to be considered.
- The USG body can override the recommended amount by WAM to any amount they feel appropriate. The amount recommended by WAM may NOT be the amount you end up receiving in allocation.
- Opportunity fund requests may be submitted at any time during the fall and spring semesters.
- A student organization may only successfully apply for an opportunity fund allocation once per year.

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## *Additional Funding Sources – The Reserve Fund*

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### **Reserve Fund**

- The reserve fund consists of money set aside for student organizations for repairs and replacements of equipment, emergencies, etc. The steps for receiving a reserve fund allocation are:
  1. Be a registered student organization with Student Activates.
  2. Fill out an *opportunity / reserve fund request* form.
  3. Come give a "pitch" to the ways and means committee.
- WAM will then make a recommendation to the USG body, who will then vote on your request.
- If you receive an allocation – it is just that, an allocation. In order to actually receive funds, you must fill out a reimbursement or advance of funds form like any other organization receiving an SAF allocation.
- The reserve fund is entirely separate from the yearly SAF allocations that are granted to student organizations each March. What your organization received in SAF allocation has no impact on reserve fund requests.

### **Reserve Fund Guidelines and Requirements**

- Student organizations are not required to have received an SAF allocation to apply for a reserve fund allocation.
- A representative from your organization is required to "pitch" to WAM in person in order for your request to be considered.
- The USG body can override the recommended amount by WAM to any amount they feel appropriate. The amount recommended by WAM may NOT be the amount you end up receiving in allocation.
- Reserve fund requests may be submitted at any time during the fall and spring semesters.
- A student organization may only successfully apply for a reserve fund allocation once per year.

**Note:** Per the USG constitution, USG is required to keep a minimum of \$50,000 in the reserve fund at all times. At the end of each year, any SAF money leftover is placed into the reserve fund to be carried over into the next year.

# Frequently Asked Questions

## Regarding Travel and Van Rentals:

**Q:** How much were my van rental and fuel charges?

**A:** Generally, student organizations should contact the Michigan Tech Motor Pool (<http://www.mtu.edu/facilities/husky-motors/rentals/>) to inquire about van rental and fuel charge amounts. USG generally does not receive the amounts until a month or more after they occur.

**Q:** What are the policies related to travel? Can I travel? Etc.

**A:** You can travel as much as you want, but you will only be eligible for reimbursement from USG if the travel is on your approved budget. Policies related to travel are dictated by the Student Activities office, and may be found at <http://www.mtu.edu/student-activities/student-orgs/travel/>.

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## Regarding Forms and Requests

**Q:** Which form should I fill out?

**A:** *the answer to this question is on pages 5-8. Two general guidelines are below*

- Did your organization receive an allocation in the spring? (If not, you can't use a reimbursement or advance of funds request, but you can potentially utilize the opportunity / reserve funds)
- If your organization received an allocation in the Spring, is the item you are wanting funds for on your budget? (If the answer is no, you must use an opportunity or reserve funds request form, depending on the request).

**Q:** Where is the money I requested?

**A:** The general process for request processing is described on page 5. Keep in mind, from the date of submission, funds can take 1-4 weeks to be distributed to organizations.

**Q:** What is the status of my opportunity / Reserve Funds Request?

**A:** All opp/reserve funds requests questions can be directed to [usg-treasurer@mtu.edu](mailto:usg-treasurer@mtu.edu). The ways and means committee handles these requests.

**Note:** As stated in this manual and on the opp / reserve funds forms **students must fill out a reimbursement or advance of funds request after they receive and opp / reserve fund allocation to actually receive their funds.**

**Q:** I want to plan a large scale event

**A:** All questions related to large scale events should be directed to student activities.