INFORMATION PACKET

Student Activity Fee (SAF) Funding Request
Material for Academic Year 2020-2021

Presented by the
Ways and Means Committee

Leo Stelmaszek, USG Treasurer
Melanie Thomas, USG President
Zbigniew Bell, USG Vice President
Zachary Olson, USG Secretary
Jack Mitchell, USG At-Large Representative

Stefani Vargas Krause, Advisor
Beka Horsch, Advisor
# Application and Allocation Timeline

<table>
<thead>
<tr>
<th>Date (year 2020)</th>
<th>Event</th>
<th>Time, Location, Notes</th>
<th>Page #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, Jan. 22nd</td>
<td>Mandatory Information Session</td>
<td>5:30 PM, Fisher 135</td>
<td>N/A</td>
</tr>
</tbody>
</table>
| Wednesday, Feb. 5th      | Submission Requirements Due (by 12:00 PM)  | **Budget & financial statements:**
                           |                                            | Fill out on Google Drive. Upload to Involvement Link                                    | 3      |
                           |                                            | **Funding Agreement:** Found on page 9
                           |                                            | Turn into USG office                                                                   |        |
                           |                                            | **Questionnaire:** Found online @ https://forms.gle/bQxxkDgnkoa8ZvfDA                  |        |
| Wednesday, Feb. 17th -   | Sign up for Budget Hearing Time Slot       | Sign-ups will be sent out via email and accessible via google calendar                 | 4      |
| Friday, Feb. 21st        |                                            | **Note:** ALL submission requirements must be turned in before you sign up for a hearing slot! |        |
| Thursday, Feb. 27th -    | 10 minutes budget hearing with the Ways    | **Note:** Signs will direct you to the right room in the MUB.                           | 4      |
| Sunday, Mar. 1st         | and Means Committee                       |                                                                                        |        |
| Wednesday, Mar. 4th      | Allocation Recommendations Announced       | An email will be sent to all Student Organization Officers.                             | 5      |
| Monday, Mar. 16th        | Budget Appeals                             | Sign-ups will be on Mar. 5th and will close on Mar. 19th at 5:00PM
                           |                                            | Appeals will take place from 4:00PM-6:00PM in the Datolite Room.                      | 5      |
| Monday, Mar. 25th        | Final Allocation Recommendations Announced | An email will be sent to all Student Organization Officers.                             | 5      |
| Wednesday, Mar. 25th     | USG Votes on 2020-2021 Allocations         | Vote will take place at the USG general body meeting, beginning at 7:00PM.             | 5      |

*Undergraduate Student Government*
Checklist of Important To-Do’s

#1 ☐ Read this packet carefully

#2 ☐ Upload proposed budget and past financial statements

#3 ☐ Complete the Student Organization Questionnaire (https://forms.gle/bQxxkDgnkoa8ZvfDA)

#4 ☐ Sign the Student Activity Fee Funding Agreement

Note: Items #1-4 must be completed before item #5!

#5 ☐ Sign up for a 10-minute budget hearing time slot via google calendar

#6 ☐ Attend your budget hearing

#7 ☐ Diligently check email for your funding updates

BE SURE TO CHECK THE TIMELINE FOR APPLICABLE DUE DATES!
SAF Funding Request Submission Requirements

2020-2021 Proposed Budget and Past Financial Statements

- Each registered student organization is required to submit a proposed budget for the 2020-2021 academic year to their Involvement Link (https://www.involvement.mtu.edu)
  - A budget template will need to be filled out on Google Drive. From here, it can be downloaded and then uploaded to Involvement Link.

- Each organization must upload financial statements for the past two years to Involvement Link. Include all sources of funding, including department contributions, Michigan Tech fund accounts, corporate donations, and any other funding sources.

Student Organization Questionnaire

- The student organization questionnaire is used to help the Ways and Means Committee learn more about each organization prior to budget hearings.

- The questionnaire is online @ https://forms.gle/bQxxkDgnko8Zv7DA

Student Activity Fee Funding Agreement

- The SAF Funding Agreement is on page 7 of this packet. The agreement must be signed by each officer of the applying organization and a current advisor.

- The SAF funding agreement should be submitted to the USG office (MUB 113).
Budget Hearings

- **Required**: Each organization that wishes to receive SAF funding from the allocation fund for the 2020-2021 academic year **must** attend a budget hearing.

- **Sign Ups**: Sign-ups will be done via google calendar.
  - Sign-ups will open on **17 Feb 2020** and close on **21 Feb 2020 at 12pm**.
  - Student organizations must sign up for a budget hearing on time in order to receive a slot.
  - Once you have signed up, changes to your chosen slot will need to be approved by the Ways and Means Committee.

- **Locations**: Budget hearings will be located in the Memorial Union Building:
  - Thursday **Alumni Lounge A**
  - Friday **Alumni Lounge A**
  - Saturday **Superior Room (MUB Basement)**
  - Sunday **Alumni Lounge A**

- **Time Frame**: Budget hearings will take place **February 27th – March 1st**:
  - Thursday, 27th **5:30pm – 11:00pm**
  - Friday, 28th **5:30pm – 11:00pm**
  - Saturday, 29th **8:30am – 11:00pm**
  - Sunday, 1st **8:30am – 11:00pm**

- **Additional Important Information**:
  - Budget hearings will be ten minutes long.
  - During the hearing, each organization will have the opportunity to discuss their budget and discuss their organization’s goals with the Ways and Means Committee. The Ways and Means Committee will ask each organization questions about the items on their budget, and about the organization itself.
  - Budget hearings are **NOT** supposed to be intimidating! They are an opportunity for organizations to brag about their accomplishments and discuss goals for the upcoming year.
  - Please arrive to your hearing 10-15 minutes early. You will be called in when the Ways and Means Committee is ready for you. Failure to show up at budget hearings will result in a default allocation of $0.
Allocation Recommendations and Appeals

Initial Recommendations

- The Ways and Means Committee will announce initial allocation recommendations on **March 4th**. A spreadsheet with each organization’s recommended allocation will be sent out via email to all student organization officers listed on Involvement Link.

Appeals Requests

- Student organizations may request an allocation appeals hearing for the following reasons:
  1. You feel you should receive a different allocation than the Ways and Means Committee has recommended, **and you can demonstrate why**.
  2. If there is a valid reason you missed budget hearings that you can demonstrate to the Ways and Means Committee.

- Appeals will be considered on a case by case basis via Treasurer email **usg-treasurer@mtu.edu**.

- Appeals hearings will take place on **Monday, March 16th**

  **Note:** The Ways and Means Committee will assign appeal hearing times to student organizations on a first come, first serve basis. If your request is approved, you will be notified via email of your hearing prior to the budget appeal date.

The Ways and Means Committee reserves the right to deny appeal requests for any reason.

Final Allocation Recommendations and Vote

- The Undergraduate Student Government will vote on final allocation amounts for the 2020-2021 academic year on **Wednesday, March 25th, 2020**.

- The allocation amount voted on at this time will reflect the original Ways and Means Committee allocation recommendations and any changes as a result of the appeals hearings.

- Final allocation recommendations will be announced via email on **Monday, March 25th, 2020**. An email will be sent to all student organization officers.
### Org Name 2019-20 Budget

<table>
<thead>
<tr>
<th>Item #</th>
<th>Revenue Sources</th>
<th>Total amount</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Member dues</td>
<td>$400.00</td>
<td></td>
</tr>
<tr>
<td>1.2</td>
<td>Funding event 1</td>
<td>$200.00</td>
<td></td>
</tr>
<tr>
<td>1.3</td>
<td>Funding event 2</td>
<td>$1,000.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total Revenue</strong></td>
<td><strong>$1,600.00</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Expenditures

<table>
<thead>
<tr>
<th>Item #</th>
<th>Equipment</th>
<th>Total amount</th>
<th>Requested amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Office Supplies</td>
<td>$500.00</td>
<td>$400.00</td>
</tr>
<tr>
<td>2.2</td>
<td>Outdoor Gear</td>
<td>$1,500.00</td>
<td>$1,100.00</td>
</tr>
<tr>
<td>2.3</td>
<td>Safety equipment</td>
<td>$300.00</td>
<td>$300.00</td>
</tr>
<tr>
<td>3.0</td>
<td>Trips/Competitions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1</td>
<td>Competition A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1.1</td>
<td>Travel</td>
<td>$900.00</td>
<td></td>
</tr>
<tr>
<td>3.1.2</td>
<td>Hotel</td>
<td>$800.00</td>
<td></td>
</tr>
<tr>
<td>3.2</td>
<td>Conference B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2.1</td>
<td>Travel</td>
<td>$400.00</td>
<td></td>
</tr>
<tr>
<td>3.2.2</td>
<td>Registration</td>
<td>$100.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total Expenditures</strong></td>
<td></td>
<td><strong>$3,700.00</strong></td>
</tr>
</tbody>
</table>

### Totals

- Expenses: $3,700.00
- Revenue: $1,600.00
- Request Amount: $2,100.00
Student Activity Fee Funding Agreement 2020-2021

I understand and have read Article V Section 1 - 8 of the Undergraduate Student Government Bylaws

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Position</th>
<th>Name (print)</th>
<th>Email @ mtu.edu</th>
<th>Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>President</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vice President</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Treasurer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Secretary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Advisor</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Article V – Student Activity Fee Funding Request Policy

Section 1 – Statement of Purpose
1. The purpose of the Student Activity Fee Funding Request Policy is to establish qualifications necessary for fundable accounts to request and receive funding from the Student Activity Fee, as well as to define allowable requests and expenditures that may come from the Student Activity Fee.

2. Undergraduate Student Government fundable accounts include Registered Student Organizations as recognized by Student Activities, Special Budget Groups as recognized by the Undergraduate Student Government, programs and initiatives sponsored by Student Affairs, and University Traditions as defined in Article V Section 1.3.

3. University Traditions that are fundable by the Undergraduate Student Government are events or programs that are considered to have historically benefited the campus community and the Student Assembly as a whole.

4. The Undergraduate Student Government and Director of Student Activities will determine the percentage of distribution to fundable accounts.

5. In order to effectively manage registered student organizations, the Student Activity Fee may be allocated in part for online student organization management systems and for staff that directly coordinate Registered Student Organizations. Such allocations must be determined by the Vice President of Student Affairs and Advancement each year and be allocated before the distribution to fundable accounts is determined.

Section 2 – Deduction of Student Organization Allocations
1. The full amount of allocation for a student organization will be received if and only if the student organization has re-registered for the academic school year by the date set by Student Activities.

2. A student organization will receive seventy-five percent of their allocation if the organization has re-registered for the academic school year by 5:00 p.m. on the Friday after the date set by Student Activities.

3. A student organization will receive fifty percent of their allocation if the organization has re-registered for the academic school year by 5:00 p.m. on the second Friday after the date set by Student Activities.

4. A student organization will receive no funding (amount of $0.00) from the Student Activity Fee if the organization has not re-registered for the academic school year after 5:00 pm on the second Friday after the date set by Student Activities.

Section 3 – Eligibility to Request Funds
1. All organizations requesting funds must be registered for the current academic year with Student Activities.

2. The Undergraduate Student Government may also fund activities and programs that may benefit the Student Assembly.

3. The organizations must have membership that is open to all students at Michigan Technological University or an event that will be available to all students.

Section 4 – Fundable Requests
The Undergraduate Student Government may allocate funds for the following purposes:
1. Projects and Activities
a. These activities must be open to the entire student population of Michigan Technological University.
b. The project or activity will showcase a skillset of the organization.

2. Equipment and Capital Outlay
a. The Undergraduate Student Government may assist an organization in purchases.
b. The organization must own, insure and be responsible for proper use and secure storage.
c. Special consideration will be taken for equipment reserved for safety purposes.

3. Competitions
a. The Undergraduate Student Government may provide funding for the total registration of the team, housing, and travel expenses for organizations.

4. Conferences and Symposia
a. The Undergraduate Student Government may provide funding for the professional training and advancement of students in an organization. This funding may include travel, housing and registration fees.

5. Professional Business Trips
a. The Undergraduate Student Government may provide funding for the organization to attend a professional event that may further their career. This funding will include travel and housing.

6. Cultural Experience
a. The Undergraduate Student Government may provide funding for food if the organization can provide reasoning that it will demonstrate cultural significance. This is an allowable exception to Article V, Section 5.2.
b. Such an exception as described in Article V, Section 4.6a. to Article V, Section 5.2 can be made only at funding request hearings in the spring semester or during an opportunity or reserve fund request.

Section 5 – Expenditures Not Eligible for Funding
1. Alcohol
2. Food
3. Giveaways or items that will be distributed
4. Monetary distributions to members of organizations or charities
5. Awards or Prizes
6. Items outside the scope of an organization
7. Salaries for full-time or part-time staff except as stated in Article V, Section 1.5
8. Contributions or donations to the campaign fund of any candidate or political movements; excluding contributions to organizations promoting advocacy for higher education and student rights. This exclusion is limited to a maximum of 5.0% of the Student Activity Fee budget.

Section 6 – Funding Request Requirements
Student organizations participating in the Student Activity funding request hearings, thus requesting funds for the next academic year, must adhere to the following guidelines:
1. At least one representative of the organization must attend the annual Undergraduate Student Government funding request hearings information session.
2. At least one representative of the organization requesting funds must come before the Undergraduate Student Government Ways and Means Committee at the Student Activity Fee funding request hearings in the spring semester.
3. The Undergraduate Student Government shall be responsible, within reason, for communicating with Registered Student Organizations the dates and times of these funding request hearings.
4. Failure to meet with the Ways and Means Committee at this time will grant no allocation (amount of $0.00) for the year in which funding is to be requested.
5. If the organization requesting is unable to attend the scheduled hearing times, a member from the organization must contact the Treasurer of the Undergraduate Student Government at least five business days prior to the group’s scheduled hearing time to make other arrangements.

6. All procedures should be reviewed annually by the Ways and Means Committee and be distributed to all organizations at the annual information session. Failure to follow proper procedures will be considered to be a failure to meet with the Ways and Means Committee.

7. If an organization loses registered status from Student Activities at any point during this process, the process is halted until corrections have been made

Section 7 – Funding Request Hearings

1. The Ways and Means Committee may allow additional Undergraduate Student Government or Student Assembly members to participate in the funding request hearings in an advisory role.

2. In the absence of a member of the Ways and Means Committee during the funding request hearings, the Treasurer may appoint a temporary replacement Undergraduate Student Government representative that will serve as a voting member of the Ways and Means Committee until the absent member returns.

3. The Ways and Means Committee has the authority to exempt items from the final student organization budgets. Such exemptions must be approved by the Undergraduate Student Government.

4. For the betterment of student organizations, the Ways and Means Committee may recommend an exemption to certain items on a student organization budget during funding request hearings to allow for these items to be eligible for Opportunities or Reserve Fund requests during the next fiscal year.

5. All Registered Student Organizations may appeal the outcome of the funding request hearings. The first appeal will be to the Ways and Means Committee, and the final appeal will be made directly to the Undergraduate Student Government.

6. All recommendations made during funding request hearings must be approved by a two-thirds majority of the Undergraduate Student Government.

Section 8 – Allocation Reimbursement Requirements

1. The student organization requesting reimbursement from their allocation must be currently registered with Student Activities.

2. Allocations must be claimed after purchase, except in cases of special circumstances, which are to be determined by the Ways and Means Committee.

3. Organizations requesting reimbursement from their allocation must do so before the end of the academic year in which the allocation was given for.

4. If an organization requests funding for summer expenditures, arrangements must be made with the Ways and Means Committee before the end of the academic year.

5. The Undergraduate Student Government will not under any circumstances retroactively distribute funds for a previous academic year or for a purchase or expenditure over four months after the purchase date.

6. The Undergraduate Student Government may not distribute funds for expenses that are not listed on the student organization’s final approved budget.

7. The Undergraduate Student Government has the authority to authorize revisions to a student organization’s budget.

8. When a Registered Student Organization provides a “service” or equipment for another organization, they must present them with a receipt at the time of the event. The receipt must also be signed by both parties at the time of the event.