



BUDGET HEARING INFORMATION PACKET

*Student Activity Fee (SAF) Funding Request Material
for Academic Year 2021-2022*

Presented by USG's Ways and Means Committee

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Application and Allocation Timeline

Date (year 2021)	Event	Time, Location, Notes	Page #
Wednesday, Jan. 20th	Mandatory Information Session 1	6pm-7pm https://bit.ly/2M30MOA	N/A
Thursday, Jan. 21st	Mandatory Information Session 2	12pm-1pm https://bit.ly/2M30MOA	N/A
Friday, Feb. 5th	Submission Requirements Due (by 12:00 PM)	Found online @ https://bit.ly/3iqSiNn	2
Monday, Feb. 8th - Monday, Feb. 15th	Sign up for Budget Hearing Time Slot	You will be directed to sign up after submitting all requirements here: https://bit.ly/3iqSiNn <u>Note:</u> ALL submission requirements must be turned in before you sign up for a hearing slot!	3
Thursday, Feb. 18th - Sunday, Feb. 21st	Budget hearings with the Ways and Means Committee (10 minutes)	Zoom: https://bit.ly/2XUla5Q Thursday: 6:30pm – 11:30pm Friday: 6:30pm – 11:30pm Saturday: 8:30am – 11pm Sunday: 8:30am – 11pm	3
Friday, Feb. 26th	Allocation Recommendations Announced	All student organization officers will receive an email with the recommendations.	4
Monday, Mar. 1st - Monday, Mar. 15th	Budget Appeal Sign Ups	Appeals requests must be sent to usg-treasurer@mtu.edu by Monday March 15th at 5pm. You will be assigned an appeal time slot.	4
Thursday, Mar. 18th - Friday, Mar. 19th	Budget Appeals	4:00PM-6:00PM via Zoom <i>by appointment only.</i>	
Wednesday, Mar. 24th	USG Votes on 2020-2021 Allocations	Vote will take place at the USG general body meeting, beginning at 7:00PM.	4
Friday, Mar. 26th	Final Allocation Recommendations Announced	All student organization officers will receive an email with the final allocations as approved by the USG general body.	4

SAF Funding Request Submission Requirements

2021-2022 Proposed Budget and Past Financial Statements

- Each registered student organization is required to submit a proposed budget for the 2021-2022 academic year to their [Involvement Link](#).
 - A budget template will need to be filled out. From here, it can be [downloaded](#) and then uploaded to [Involvement Link](#) as a **spreadsheet**.
- 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 (WaM) learn more about each organization prior to budget hearings.
- The questionnaire can be found here: <https://bit.ly/3iqSiNn>.

Student Activity Fee Funding Agreement

- The SAF Funding Agreement must be completed by each officer and at least one advisor.
 - Fill out the Funding Agreement here: <https://bit.ly/3sJw0es>

Budget Hearing Procedures

Attendance

- Each organization that wishes to receive SAF funding from the allocation fund for the 2021-2022 academic year **must** attend a budget hearing.
- **Failure to show up at budget hearings will result in a default allocation of \$0.**

Signing Up for a Hearing

- Sign-ups will be done via a link sent to officers after all submission requirements have been received by the Ways and Means Committee.
- Sign-ups will open on **February 8th, 2021** at noon and close on **February 15th, 2021 at 12pm.**
- Once you have signed up, changes must be approved by the USG Treasurer.

Hearing Locations

- Budget hearings will be held via Zoom: <https://bit.ly/2XUla5Q>.

Dates & Times

- Budget hearings will take place **February 18th – February 21st**:
 - **Thursday, 18th** **6:30pm – 11:30pm**
 - **Friday, 19th** **6:30pm – 11:30pm**
 - **Saturday, 20th** **8:30am – 11:00pm**
 - **Sunday, 21st** **8:30am – 11:00pm**

Important Information

- Budget hearings are ten (10) minutes long.
- During the hearing, each organization will have the opportunity to discuss their budget, their organization's goals, and answer/ask funding related questions 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, so come prepared!
- Budget hearings are not supposed to be intimidating! This time is an opportunity for organizations to show off their accomplishments, discuss goals for the upcoming year, and work with USG to enhance their organization.
- **Please arrive early.** You will be called in from the Zoom waiting room when the Ways and Means Committee is ready for you.

Allocation Recommendations and Appeals

Initial Recommendations

- The Ways and Means Committee will announce initial allocation recommendations on **Friday, Feb. 26th** via email to all student organization officers.

Appeals Requests

- Student organizations may request an allocation appeals hearing IF:
 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.**
- Appeals will be considered on a case by case basis and may be requested via email to the USG Treasurer at **usg-treasurer@mtu.edu**.
 - WaM 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..
- Appeals hearings will take place **Thursday, Mar. 18th - Friday, Mar. 19th from 4pm-6pm via Zoom:**

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

Final Allocation Recommendations and USG Approval

- The Undergraduate Student Government will vote on the final allocation amounts for the 2021-2022 academic year on **Wednesday, March 24th, 2020**.
 - USG meetings are open to the public and you may attend.
- Final allocations will be announced via email on **Friday, March 26th, 2020**.

SAF Funding Checklist

- #1 Read this packet carefully & ensure that all officers are listed correctly on [Involvement Link](#)
- #2 Upload proposed budget ([template](#)) and past financial statements <https://bit.ly/2LQpGk7>
- #3 Complete the Student Organization Questionnaire <https://bit.ly/3iqSiNn>
- #4 Each member of the executive board AND an Advisor must sign the Student Activity Fee Funding Agreement via [Google Forms](#)

Items #1-4 must be completed before you will receive the link to complete step 5

- #5 Sign up for a 10-minute budget hearing time slot
- #6 Attend your budget hearing
- #7 Check your email for any funding updates

BE SURE TO CHECK THE TIMELINE FOR APPLICABLE DUE DATES!

Our Bylaws

Below are the guidelines that you as an organization need to follow for funding, what the Undergraduate Student Government can actually fund, as well as who is eligible for funding.

Article XIII – 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 Leadership and Involvement, 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.
 - a. University Traditions are defined by Student Leadership and Involvement and the Tech Traditions Committee
4. The Undergraduate Student Government and Director of Student Leadership and Involvement 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 Chief Student Affairs Officer 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 Leadership and Involvement.
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 Leadership and Involvement.
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 Leadership and Involvement.
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 Leadership and Involvement.

Section 3 – Eligibility to Request Funds

1. All organizations requesting funds must be registered for the current academic year with Student Leadership and Involvement.
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 Symposiums
 - 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. 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.
 - c. Such an exemption as described in Article V, Section 4.6.a. to Article V, Section 5.2 should be granted upon the successful review of documents providing evidence that the food in question is cultural.
 - i. The supporting documents may be but are not limited to recipes.
6. Advocacy for Students Rights, Freedoms, and Education
 - a. The Undergraduate Student Government may provide funding for the registered student organization to advocate for student rights, freedoms, and education on a scale of national to local government.
 - i. Consideration must be given to the proposed usage of advocating funding so as to not interfere with Article XIII Section 5.8 of the Undergraduate Student

Government Bylaws.

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.

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 Leadership and Involvement 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.
 - a. Upon the approval of an exemption from a final registered student organization's budget, the Undergraduate Student Government Treasurer will inform the concerned

organization with the relevant information on the exception and the rationale for it.

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 Leadership and Involvement.
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.