



UNIVERSITY of ROCHESTER
STUDENTS' ASSOCIATION
GOVERNMENT

STUDENTS' ASSOCIATION APPROPRIATIONS COMMITTEE

Business Manager Manual

Advisor Version

University of Rochester Students' Association 2018-2019

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Overview Students' Association Appropriations Committee (SAAC)

The Students' Association Appropriations Committee (SAAC) is responsible for managing the finances of the Students' Association in a way that is both fiscally responsible and in the best interest of the University of Rochester student body. The Students' Association (SA) budget is funded entirely by the Student Activity Fee that each student contributes as part of their tuition. For this reason, it is our top priority to allocate funds in a manner that will cultivate positive student experiences.

SAAC is comprised of the Students' Association Treasurer, Deputy Treasurer, Student Accountants, Staff Accountant, SA Senators and the SAAC Advisor (the Director of Student Activities). In addition to the daily tasks of monitoring an organization's budget and being the primary point of contact for Business Managers questions, the committee meets on Tuesday nights at 8:00 PM to hear requests by student organizations for supplemental funding. Each spring, the committee reviews budget submissions and allocates funds to each eligible student organization for the upcoming year.

Budgets are available for use starting on the first day of class each academic year, unless pre-arranged with SAAC and the Student Organization Finance Office, known as "SOFO."

Transactions must be processed through SOFO located in the Ruth Merrill Center in Wilson Commons, room 101E. The office is open Monday through Friday, 8:00 AM until 4:00 PM. **In the event that SOFO is closed due to unforeseen circumstances, please email the SA Treasurer or SA Staff Accountant for assistance.**

The majority of transactions for SA recognized student organizations will occur in SOFO. Transactions processed by SOFO include (but are not limited to) online orders, credit card sign-out, Copy Center order placements, generation of Purchase Orders, payment of invoices via check, payment of internal U of R vendors via 312 requisitions or e-mail (including Meliora Catering, ECM and Facilities), and payment of contracts by check for individual Service Providers.

Students' Association – Ten Principles of a Student Organization

The Student's Association Senate aims to support an organizational system which allows students to pursue their interests while focusing their energy in ways that promote community on the River Campus. The Ten Principles of Student Organizations are designed to encourage more collaboration, more community-directed programming and fewer self-serving activities. In order to gain Students' Association recognition, an organization must fulfill all Ten Principles.

The Ten Principles are as follows:

- A clear and Focused Mission
- Openness
- Embodiment of the Communal Principles
- Membership
- Uniqueness
- Sustainability
- Community Contributions
- Leadership Development
- Resource Responsibility
- A Spirit of Meliora

Student Accountants

Student Accountants are undergraduate students that are selected by SAAC after an application and interview process. Once elected, Student Accountants are confirmed by SA Senate. Student Accountants are responsible for keeping track of Student Organization's income and expenses, approving paperwork submitted to SOFO, hearing and voting on Supplemental hearing's and participating in the annual Budgeting Allocation process. Student Accountants work closely with Business Managers throughout the year and during the spring budgeting process to help Organizations submit a budget to be presented to SAAC & Senate.

For those who may be interested in becoming a Student Accountant, selections are open to the entire student body, and include an application and interview process. This process will be publicized well in advance throughout campus, and applications are available online. Student Accountants hold regular office hours in SOFO throughout the year. A link to the Student Accountant Office Hours can be found below.

[Student Accountant Office Hours](#)

Student Accountants typically hold office hours up to 3 days per week for one hour at a time, but Business Managers are encouraged to make an appointment with their Student Accountant if the scheduled office hours conflict with their schedule. Office hours for each accountant are available online on the [SA Government Website](#) and will be posted on the SOFO door. If you have questions or concerns regarding your budget, please do not hesitate to contact your organization's Student Accountant or the Treasurer. If you have questions or concerns regarding SOFO, please contact the SA Staff Accountant. We are here to help you and want your organization's activities and programs to run smoothly. A link to the Student Accountant Category assignments can be found below.

[Student Accountant Assignments](#)

ADVISORS: If you are unable to reach your Student Accountant, please copy the SA Staff Accountant in on the next e-mail correspondence that you send to them.

Business Manager Roles & Responsibilities

As a Business Manager, you are responsible for accurately tracking your organizations transactions in the Student Organization Finance Office (SOFO). It is of utmost importance that you, as the Business Manager, are aware of your Organizations financial status at all times. Please read through the guidelines within this manual to familiarize yourself with the proper use of your Organizations funds. If at any time, you are unable to act on your organization's behalf, please notify your Primary Advisor and the SA Treasurer. During emergencies (with proper authorization from the Treasurer) other e-board members may be permitted to transact on your behalf.

ADVISORS: If the Business Manager is unable to transact on the Organization's behalf, you can do so to ensure that paperwork is completed in a timely fashion. It is strongly urged, that you assist the Organization's during breaks if payments must be processed.

Below is a brief list of your responsibilities as Business Manager (please note that this does encompass all Business Manager duties):

- Keep your Student Accountant aware of all planned activities that require financial resources well before their planned implementation.
- Submit all Organization transactions to SOFO for processing
 - Please allow 2 – 3 business days (Monday – Friday) for processing
- Submit or ensure submission of Activity Reflection form for all events hosted by the Organization within 2 weeks of the event date.
 - Budgets and Future Supplemental requests will be negatively impacted if Activity Reflection forms are not completed within 2 weeks of program completion.
- Track and initiate all of your Organizations expenditures and income.
- Maintain the respected name of the Students' Association of the University of Rochester by properly handling transactions, initiating payment of bills in a timely manner, and using courtesy and common sense.
- Keep complete and accurate records of your organization's finances.
- For Budgeted Student Organizations, plan & Submit a budget to SAAC that adheres to budgeting guidelines outlined in the "Funding Guidelines" section at the end of this manual.

ADVISORS: Correspondence and timelines for Budgeting will be distributed to the Advisor, Business Manager & President by the Treasurer or Student Accountants in December.

- Reach out to your student accountant for any and all questions you might have
- For Budgeted Student Organizations, please discuss deviations from your organization's submitted budget with your primary advisor and Student Accountant well in advance.

ADVISORS: Reallocations must be discussed with the Primary Advisor AND Student Accountant prior to submissions. It is recommended that if correspondence regarding reallocations is occurring over e-mail that the Student Accountant be copied in from the start.

- Reallocations of a single line item, must be reviewed and approved by your assigned Student Accountant
- Reallocations of an entire budgeted Program/Event that is under \$500 must be reviewed and approved by your assigned Student Accountant
- Reallocations of an entire budgeted Program/Event that is between \$500 and \$999 will require the submission of a [SAAC Exception Form](#) and will be reviewed by SAAC.
- Reallocations of an entire budgeted Program/Event that is \$1,000 or more will require the submission of a [SAAC Exception Form](#) and will be heard before SAAC in the format of a Supplemental hearing.

Funding

Funding Limitations

Article V- Section Two Letter F of the Organization Administration & Review Committee Guidelines regarding Funding Eligibility states:

“Funding shall not be granted to:

- a. Student organizations whose purposes and programs violate the constitutional discrimination policy found in Article V, Section 2
- b. Student organizations whose purposes and programs are religious or political in nature
 1. Flat funding is available for religious and political organizations through Appropriations Committee
- c. Student organizations whose purposes and programs are political in nature
 1. A SA funded organization may not explicitly advocate for or against a political party, candidate, or public official
 - i. Exception: A SA funded organization may still receive funding if they criticize or support a public official’s, political candidate’s or political party’s policies and actions
 2. Student organizations that set a precedent that may lead to the future funding of a limitless number of similar organizations
 3. Flat funding is available for political organizations that satisfy the above criteria through the Appropriations Committee”

SOFO Account Types

- Flat Funded
- Budgeted
- Agency

Flat Funded

Flat Funded organizations are Student Organizations that do not submit a budget to SAAC. These organizations receive a predetermined dollar amount each year that has reduced limitations. For example, a Flat Funded organization can spend their entire allotment on food for their individual members, whereas Budgeted organizations cannot. Student Organizations that fall under the following Categories are considered “Flat Funded”:

- Political
- Religious
- Pre-Professional
- Undergraduate Councils
- Class Councils

The amount of funding varies by Category.

Political & Religious organizations receive \$80 per academic year.
Pre-Professional & Undergraduate Councils receive \$200 per academic year.
Class Councils receive \$12,000 per academic year (the Senior Class receives additional funding from the Senior Student Activity fee).

Flat Funded organizations are NOT required to attend budgeting presentations, but they are required to adhere to SOFO & SAAC policies related to transactions and MUST send a Business Manager to the [Fall Leadership training](#).

ADVISORS: Please ensure that your Flat Funded organizations attend the Business Manager training during the Fall Leadership training. New Business Managers are strongly encouraged to attend the Mid-Year Leadership Training.

Budgeted

Budgeted organizations are Student Organizations that participate in budgeting in the spring semester each academic year. All budgeted Student Organizations are automatically allocated \$40/semester in their SOFO account to hold a General Interest Meeting. These funds are specifically for GIM related expenses and cannot be reallocated.

SA Recognized Student Organizations that receive funding via a budget are not permitted to be exclusive or selective in nature (i.e. requiring auditions or application to be a member of the Student Organization).

ADVISORS: Business Managers are required to attend the annual Budget Training held by SAAC. Correspondence regarding the dates of Training will be distributed to the Advisor, Business Manager & President by the Treasurer or Student Accountants prior to the Spring Semester.

Agency

Agency Accounts are available for SA Recognized organizations that do not receive SAAC funding through the budgeting process, but bank with SOFO. Financially, they earn their own money and have limited restrictions on how their funds are spent. Agencies are permitted to use their money to purchase gift cards, or other give-away items. Agency Student Organizations must adhere to SOFO purchasing policies and methods.

Student Organizations that do not receive SAAC funding, but elect to bank with SOFO are afforded the many benefits of banking with SOFO, including but not limited to:

- Access to Credit Cards at Local Vendors
- Tax Exemption for most transactions
- Ability to temporarily draw account negative
- No fees for low balances
- Transition of E-boards does not impact the Account (ex. No name changes, etc.)

- Auto Payment of invoices from Select Vendors
- Use of the Ruth Merrill Copier to make 50 or Less copies on behalf of a Student Organization
- Ability to receive Gifts from Alumnus through Alumni & Advancements giving page and the ability for Alumnus to receive tax credits/receipts for donation.

ADVISORS: Student Organization's that wish to transition from a "Budgeted" student organization, can request this change via the SAAC Exception form. Please ensure that you have discussed with them how this will impact them in the future, should they decide to make this change. It is recommended that the Student Accountant be looped into this conversation prior to the Exception form being submitted.

Expectations for Use of Funds

Advertising Budgeted Events

There must be sufficient campus-wide publicity for all activities. All organizations that receive funds from the SA must include the following statement in their advertising:

” _____ is a SA funded organization.”

This statement should be printed in an appropriate font size, at least 12 point, so that it is clearly visible.

Food Purchases

The SA will not fund food for the exclusive consumption of organization members. Purchases of food for consumption by members only, require that income will be collected in advance and the moneys dispensed shall not exceed the income brought in. The following are guidelines, which shall be strictly enforced:

- Interest Meetings- The sum of \$40 shall be allotted for each interest meeting, one per semester
- Speakers- The SA will only pay the cost of the speaker’s meal. Any SA member accompanying the guest shall be responsible for their own expenses.
- Reception- Receptions will only be funded for special events, such as speakers and exhibitions, with prior approval by the organization’s Student Accountant, the Treasurer and in some instances, SAAC.

ADVISORS: Food purchases that are outside of SAAC funding guidelines are permitted, however, the funds must be deposited in FULL prior to the bill being presented to SOFO for payment. If an exception needs to be granted to this policy, please have your student organization submit an Exception form prior to finalizing the details for the purchase.

Charitable & Fundraising Events

Charitable or fundraising events will not be subsidized as students may object to their money going to sponsor an event for charity of which they disapprove. However, supplemental funding can be used to cover the cost of advertising the event (Max of \$100), and the committee will fund \$30 for Sanitarian Permits.

If an organization would like to hold a charitable or fundraising event, they must first meet any income requirements set forth during budgeting. Once requirements have been met, any further proceeds may be donated or used to purchase items for fundraising. All publicity must include a statement of:

“Proceeds to benefit _____”

And there must be a sign prominently displayed at the door of the event with such a notice. The Business Manager should consult with their Student Accountant before such an event is planned. Community Service Network and the organizations under it, whose missions are community services, are the only exceptions to this rule.

ADVISORS: If your Student Organization has advertised that funds will be raised to benefit a Charity, please follow up with your Organization to ensure that the donation has been processed via a Check Request. Funds must be donated prior to the last day to transact for the school year (typically the last day of classes). SOFO will not automatically donate funds on your organization's behalf.

SA Property

All Equipment or Supply purchases made with SA Funds are considered the Property of the Students' Association. Should your organization be de-recognized, all items must be returned to the SA. Equipment purchased with SA funds are not to be removed from Campus without prior approval from your primary advisor, the Students' Association Treasurer and Director of Student Activities.

It is an expectation that each Student Organizations maintain an equipment and inventory list. Inventory lists will be requested by SAAC annually, prior to budgeting. Failure to submit an inventory may result in a denial of budget submission.

ADVISORS: Correspondence regarding Equipment Inventory submissions will be send to the Advisor, Business Manager & President from the Treasurer or Student Accountants during the Spring Semester.

Reimbursements

Any organization which incurs expenses upon the SA without prior approval may have their funds frozen until the amount is repaid in full. Exceptions will be granted on a case by case basis and must be sought prior to transacting.

ADVISORS: Please ensure that you have conveyed to your Student Organization's the seriousness of the Reimbursement policy. Organization's that have not sought prior approval to this policy, are not likely to receive an exception after the fact. Exceptions will be made on a case by case basis, but must be requested will in advance via the SAAC Exception Form.

Ticketing

All ticketed events must be sold through the Common Market. Updates to the ticketing policy can be found at the link below:

[Wilson Common Ticketing](#)

ADVISORS: Student Organizations must sell their tickets through Wilson Common Ticketing. All income will now come in through a JE from the Ticketing Office. Deposits of income from ticket sales that come into the SOFO office will be documented and Student Organizations will receive correspondence regarding this violation from the appropriate parties.

Violations to Policies

If a SA Recognized organization is not adhering to SAAC or SOFO policies, the Student Accountant and Treasurer may place the organization on Probation. During this period, the organization must provide monthly reports to their Student Accountant about their activities, how many people are attending their meetings, and any other information that the Student

Accountant and Treasurer deem necessary. During the probation period, SA organizations may only present a request for supplemental funding to SAAC with the approval of their Student Accountant, Primary Advisor and the Treasurer. Furthermore, organizations may only receive a budget equal to or less than their previous budget during the Probation period.

ADVISORS: In addition to Probation, the SA Treasurer may “Freeze” a Student Organizations funds until certain requirements have been met. You will be copied in in any correspondence regarding the Organizations status. Failure to attend the Fall Leadership Training (or send an authorized party in their place) will result in a Freezing of the Student Organizations funds.

Student Organization Finance Office Forms

SAAC/WCSA Request Form

The SAAC/WCSA Request form aka “the Green form” is our most frequently used form. Once completed by the Business Manager, the SAAC/WCSA Request form is filed in the “Form Drop Off” basket located on the Business Manager desk in SOFO. Requested forms will be ready for pick-up within 2-3 business days of submission, in the “Form Pick Up” basket located on the Student Accountant desk. The following transactions are initiated with the SAAC/WCSA Request form:

- Purchase Order creation
- 312 Requisition creation
- Copy Center Order
- Credit Card Sign Out
- Appointment for Online Order
- Payment of Facilities, ECM or Catering invoice

SAAC/WCSA Request Form

Organization Name: _____ Today's Date: _____

Business Manager/Requester's Name (Please Print): _____

Business Manager/Approver's Signature: _____

PAYMENT METHOD	PLEASE Circle only One:				
Purchase Order	Requisition	Copy Center	Credit Card	Appt for Online Order	Facilities, ECM or Catering
WCSA only:	RFP	T&C	JE	PCard	

Preferred Vendor: _____ Amount: _____

Event Name: _____ Event/Service Date: _____

Product Description or Explanation of how Funds will be used: _____

Purchase Orders are used for outside vendors – NOT ACCEPTED by ALL Vendors

Requisitions are for University Vendors – Barnes & Noble, Post Office, UR Tech, Public Safety, Parking, etc.

Copy Center – For in Office submission to Copy Center for Color copies, posters, etc.

Credit Cards – Walmart, Wegmans, BJ's, AC Moore, Sunoco (Gas Cards), Tops

Appointment for Online Order – For in office Credit Card purchases at vendors not listed above

Facilities, ECM or Catering – Authorization for office to pay Facilities, ECM or Catering directly

RFP/T&C – Original invoice and receipts must be presented with completed T&C

PCard – Fully signed Request form must be returned to Sue Nielsen

Please indicate Funding Source:

Budgeted Expense

Excess Income/ Carryforward

Unbudgeted

Other _____

FOR OFFICE USE ONLY	PROCESSED BY: _____	DATE: _____	FORM TYPE: _____
	FORM #(if applicable) _____	FAO & SC _____	
WCSA Accts <input type="checkbox"/> Summer Program <input type="checkbox"/> Hirst	<input type="checkbox"/> Leadership <input type="checkbox"/> Vendor <input type="checkbox"/> 2-Acct	<input type="checkbox"/> SAVans <input type="checkbox"/> 3-Acct <input type="checkbox"/> FSA	<input type="checkbox"/> RocTix <input type="checkbox"/> Copyrights <input type="checkbox"/> Programming <input type="checkbox"/> Other _____

*****Please allow 2-3 business days for request to be processed*****

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Purchase Orders (PO)

Purchase Orders are used to initiate/authorize a transaction with an external Vendor. Not all vendors accept Purchase Orders, it is the Business Manager’s responsibility to verify that it is an acceptable form of payment. Once accepted by the Vendor, it becomes

a contract that guarantees payment from the Student Organization to the external Vendor. It can also be viewed as an I.O.U., which must be paid promptly once an invoice or receipt is received by the submitting Organization.

To request a purchase order, circle "Purchase order" on the Green SAAC Request form and indicate an approximate do-not-exceed amount. Please allow 2-3 business days before picking up a purchase order form from the form pick-up basket. The white copy of the PO should be provided to the Vendor, the yellow copy is the Organization's copy to be returned to SOFO with the Invoice or Receipt attached. Invoices can also be e-mailed to asksaac@rochester.edu. Payment will be relinquished to vendor 2-3 days after documentation is received by SOFO.

312 Requisitions

312 Requisitions are the preferred payment method for internal University of Rochester Vendors. For Student Organization purposes, 312 Requisitions are used most frequently to pay:

- Public Safety
- Sanitarian
- UR Tech Store
- Barnes & Noble
- Post Office

To request a 312 requisition, circle "Requisition" on the Green SAAC Request form. If available, please attach invoice prior to submission. SOFO will generate a requisition form within 2-3 business days after your submission. The Business Manager must then pick up the requisition and is responsible for giving the blue copy to the Vendor.

Printing/Copying

50 Copies or Less:

Student Organizations that bank with SOFO can print up to 50 copies per print job through the new copier in the Ruth Merrill Center and have the cost auto-paid by their student organization SAAC account (see pricing below). This is only to be used for student organization related printing, all other print jobs submitted will be denied. Through this service organizations will have access to print in black and white or color on paper up to 11x17. Colored paper is also available for 8.5"x11" printing. Any special instructions (paper size, color, etc.) should be included when submitting your file and the preferred file types are jpeg or pdf.

Student organizations needing to print must email the print ready file to wicobuma@ur.rochester.edu or bring a hard copy to the Common Connection and then

call the Campus Center Building Manager at 585-329-9093. The building manager will meet with the organization representative at the Common Connection desk in Wilson Commons at which time the Building Manager will confirm all details and then print the job. All organization print jobs will be logged. Please keep in mind that it may take up to 20 minutes for the manager to get to Common Connection to meet with the organization representative.

Pricing per page:

- Black and white 1 sided - \$0.007
- Black and White 2 sided - \$0.014
- Color 1 sided - \$0.19
- Color 2 sided - \$0.38

Greater than 50 Copies or outside of the Ruth Merrill Copier capabilities:

Student Organizations must complete a Green SAAC Request Form and circle “Copy Center” within 2-3 days after submitting the green form the Business Manager can sign up for an Online Order appointment via the SA Government Website, sa.rochester.edu under the “Services- For Clubs” tab. These requests will be submitted via the Xerox Print Services Online Job Submission website by the SOFO Online Order Student Accountant.

Student Organizations are not authorized to initiate Xerox Print Services without receiving authorization from their Student Accountant.

Credit Cards

Credit Cards can be signed out from SOFO for the following local vendors:

- AC Moore
- BJ’s
- Home Depot
- Tops
- Wegmans
- Walmart
- Sunoco Gas Cards (Can be used at 99% of gas stations in the United States)

Credit Cards are available for pick up during SOFO business hours by the Business Manager (unless previously arranged with SOFO). A SOFO employee will help the Business Manager sign out the selected card(s) and explain how to use, if necessary. Credit cards must be returned within 1 business day of sign out (i.e. If signed out on a Tuesday, card is due back Wednesday before 4 pm. If signed out on a Friday, card is due back by Monday before 4 pm). Student Organizations that do not return Credit Cards to SOFO (or the Credit Card drop box located right outside the SOFO door) by the designated time will be charged a \$5.00 late fee per day for each late card.

Appointment for Online Order

Student Organizations that wish to order from an online vendor can do so by circling "Appointment for Online Order" on the Green Request form. The Business Manager will need to schedule an appointment with the SOFO Online Order Student Accountant by visiting the SA Government Website, sa.rochester.edu under the "Services- For Clubs" tab.

It is expected that the Business Manager will arrive to their appointment promptly and will know exactly what items they wish to purchase. Failure to arrive on time, or with a prepared list may result in cancellation of that appointment. Be aware of delivery times to ensure that all purchased items will arrive before the date they are needed.

SOFO has a Business/Tax-Exempt Amazon Prime account.

Facilities, ECM or Catering

Payments to Facilities, ECM or Catering will be processed by the SA Staff Accountant once the Green Request form has been submitted by the Business Manager. Please circle "ECM, Facilities, or Catering" on the Green Request Form. Please also attach a copy of the Work Order, or Invoice to the Request form prior to submitting the form in the Form Drop-Off bin. SOFO will process the payment and e-mail the vendor.

ADVISORS: During breaks, the SA Staff Accountant will reach out to you to receive authorization to pay Facilities, ECM or Catering invoices, please respond promptly, as our internal vendors have a tight timeline for payment.

SAAC/WCSA Check Request

SAAC/WCSA Check Request Form

Organization Name: _____ Today's Date: _____

Business Manager/Requester's Name (Please Print): _____

Business Manager/Requester's Signature: _____

Pay to the Order of/Vendor Name: _____ Amount: \$ _____

Check Delivery Method:

Mail to Vendor at: _____

Business Manager Pick up from SAAC office

Payment Details (Invoice #, Purpose of payment, etc.): _____

FOR OFFICE USE ONLY PROCESSED BY (initials): _____ DATE: _____ CHECK #: _____

*****Please allow 2-3 business days for request to be processed, Check are cut on Wed. & Fri.'s*****

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Check Requests are available on the Business Manager desk and should be used to pay for Invoices for products, Standard Performance Agreements (Contracts for Services rendered- must work with Primary Advisor to initiate), Registration fees, Contest Personnel, etc. If at any time payment is made without approval, **reimbursements are not the responsibility of SOFO or**

SAAC. All check requests must be accompanied by the appropriate documentation, (ex. Invoice, fully executed Contract w/ W-9 attached, etc.). No checks will be cut without this documentation. Checks are cut on Wednesdays and Fridays, so please plan ahead.

When using Check Requests, use full names of the people or businesses to whom checks are to be made payable. DO NOT USE NICKNAMES. Indicate if check should be mailed to the Vendor or if it will be picked up by the Business Manager and given to the vendor.

To initiate payment for an Invoice, obtain an invoice from the product vendor and then complete a salmon colored check request (shown above) and attach the invoice. If pick-up was indicated on the Check Request the Business Manager must pick up the check from SOFO (unless prior arrangements have been made). If “Mail to vendor” was selected, SOFO will mail the check on your organization’s behalf.

To initiate payment to an individual or business for services rendered, please follow the steps associated with the Standard Performance Agreement & W-9 Tax Form.

ADVISORS: Standard Performance Agreements will not be accepted if signatures are missing. Please ensure that the contract is fully executed prior to sending the Student Organization down to process payment.

Standard Performance Agreement & W-9 Tax form

A Standard Performance Agreement is the only permitted form accepted for payment to individuals or businesses for Services provided (i.e. Photographers, Caterers, etc.). The form can be obtained by working directly with the Student Organization’s Primary Advisor. The Signed agreement & W-9 must be turned into SOFO 1 week prior to the event.

Once the Standard Performance Agreement is signed, it is binding. Therefore, if your organization signs into a contract, the organization is legally responsible to pay the performer. All contracts must be signed by the Director of Student Activities (through your WCSA primary adviser). Business Managers are not permitted to sign contracts.

Once the Standard Performance Agreement is fully executed (signed by all parties) a check request can be used to initiate payment. Payment will not be processed without the fully executed contract and a completed W-9 attached to the SAAC/WCSA Check Request).

Payment to Students

SOFO does not generally issue checks to students who are active members of the organization that is seeking their services. Students are expected to donate their time and work to their Student Organization. In this context services include, but are not limited to, photography, make-up application, web design and choreography.

For SOFO's internal processing, payments to students for services must be submitted via a Standard Performance agreement with a check request and a W-9 form. They must be signed by the service provider, and the Director of Student Activities at least one week prior to the date of the event.

ADVISORS: Exceptions to this policy must be requested via the SAAC Exception Form and the Student Organization must explicitly state why a Student that is active in their organization is being paid for the activity.

Deposit Ticket

DEPOSIT TICKET		
Group Name: _____		
Date: _____		
Deposit Type: <input type="checkbox"/> Income <input type="checkbox"/> Return Petty Cash		
Source of Funds:		
<input type="checkbox"/> Fundraiser <input type="checkbox"/> Donations		
<input type="checkbox"/> Dues <input type="checkbox"/> Sales		
<input type="checkbox"/> Other: _____		
More Details: _____		

Signature: _____		
(BUSINESS MANAGER)		
E-mail: _____		
	CASH	
	CHECKS	
	TOTAL	

Deposit slips are located on the Business Manager desk and are used to Deposit funds earned by the Student Organization via Program Income, Dues, etc. or to Return Petty Cash. The information provided in the "More Details" section will be included in your Monthly report from SOFO, please be descriptive.

Funds should never be left in the "Form Drop Off" basket. A SOFO employee must verify deposits with the Business Manager, prior to accepting them. Checks should be made payable to *University of Rochester* with the Organization's name in the Memo.

SAAC/WCSA Petty Cash Request Form

WCSA/SAAC Petty Cash Request Form

Organization Name: _____ Today's Date: _____

Business Manager/Requester's Name (Please Print): _____

Business Manager/Requester's Signature: _____

Pay to the Order of: _____ Amount: _____
(Maximum of \$500)

Request Details: _____

FOR OFFICE USE ONLY PROCESSED BY: _____ DATE: _____

*****Please allow 2-3 business days for request to be processed, Check are cut on Wed. & Fri.'s*****
Revised 06/18

In limited instances, the SAAC/WCSA Petty Cash Request form may be utilized to allow for Organizations to have cash on hand to transact while travelling in remote locations that do not accept credit. (i.e. Alternative Spring Break trips, URFoot Orientation Treks, etc.). Prior approval must be granted by the SA Staff Accountant on behalf of SOFO.

ADVISORS: If you feel that one of your Student Organizations needs Petty Cash, please reach out to the SA Staff Accountant to discuss, prior to having your Student Organization complete a SAAC Exception Form.

Co-Sponsorship Form

Student Organizations that want to contribute financially or collaboratively with another Student Organization, must complete a Co-Sponsorship Form.

The Co-Sponsorship Form can be located on the SAAC website or a hard copy can be retrieved from the SOFO Business Manager desk.

Co-Sponsorship Financial Contribution

There is a \$50 minimum financial contribution for Student Organizations who wish to co-sponsor with another organization. Co-Sponsorship forms for a financial contribution under \$50 will not be accepted by SOFO. Once the Co-Sponsorship form has been signed by all parties (Both Business Managers & Primary Advisors), it can be submitted to SOFO.

ADVISORS: SOFO will not accept a Co-Sponsorship form that is missing signatures. If the Student Organization is co-sponsoring with a department, the Business Manager field for the department can be left blank. Please ensure that the Department contact's information is captured so that the SA Staff Accountant can contact them to facilitate the transfer.

Co-Sponsorship Collaboration

Student Organization's that are Co-Sponsoring events by means other than financially, must complete the Co-Sponsorship form and have it signed by all parties. This form does NOT need to be turned into the SOFO office, it is for the Organization's records only.

Auto Payment

Auto Payment is a means of paying select internal vendors. Student Organizations that solicit services from the following vendors do not need to initiate payment in SOFO, as they will automatically be paid.

Please note, any submission to the vendors listed below must be outlined in your budget- failure to adhere to the budget (ex. Requesting services that were not approved) will result in appropriate action being taken, as outlined in the SAAC bylaws.

Auto payment Vendors:

- SA Vans
- Charters
- Graphic Arts
- Campus Times
- Photography Club
- WRUR

ADVISORS: If a Student Organization wishes to dispute the amount charged by one of the Auto Payment vendors, they must contact the Vendor directly.

Supplemental Funding

A sum of money is set aside during budgeting each year that will be distributed to SA organizations by Committee Action. This money is intended for use by organizations for expenditures that were not included in their approved budget. This may include unexpected equipment needs, new programs or expanded costs for a budgeted program, or attendance at a conference. Supplemental funding cannot be requested for an event that has already occurred. Money obtained through supplemental funding requests must be used within all SAAC guidelines. **Only SA recognized student organizations are eligible for supplemental funding.**

SAAC will hear up to 2 requests (excluding conference and post-season) per academic year or grant up to \$4000 per academic year per organization, whichever happens first.

ADVISORS: If an Organization wishes to seek an exception to this policy, please discuss fully with them the need to exceed the cap. The cap exists so that money can be distributed to as many student organizations as possible. If you feel that they have a valid case to request an exception, please have them discuss with their Student Accountant prior to submitting a SAAC Exception form.

How does it work?

In order to obtain supplemental funding for your organization, it is required that you to meet with your respective organization's primary advisor, followed by a meeting with your organization's designated student accountant.

Request submissions for Program/Competition Supplemental (does not apply to Post Season) must adhere to the following submission timelines:

Large Scale Program/Events - 30 days prior to event date

Small Scale Program/Events - 10 days prior to event date

ADVISORS: These timelines were created to be consistent with Event Registration Policies and Guides.

Any organization that failed their SOAR report from the Administration and Review Committee (ARC) in the spring semester is ineligible to apply for supplemental funding the following Fall semester.

Organizations with Endowments/Gift Accounts must discuss their request with the Treasurer prior to supplemental and/or budget submissions. Organizations with these types of accounts must explain to the Treasurer how they plan to use their endowments/gifts.

ADVISORS: This policy was created in an effort to ensure that the Gift funds and endowments are being used for the purposes intended. It does not mean that Student Organizations can not apply for Supplemental.

Once you have met with your Student Accountant, you will need to complete the appropriate [Supplemental Request Form](#). Please be very specific when answering the questions asked on the request forms. Vague description of program details, funding needs, or other specifics will delay the process and does not make a very strong case for your request in front of the Committee.

Once the Supplemental request has been submitted, the Business Manager can expect to hear from the SAAC Deputy Treasurer within 14 days of Submission to set the date/time slot for the Supplemental Hearing.

ADVISORS: Please have your Student Organizations submit their Supplemental request as early as possible in order to accommodate the timeframes listed above. Once the Supplemental request has been submitted please indicate your approval or denial of the request on the designated spreadsheet. The link to the Spreadsheet will be e-mailed to Advisors by the Deputy Treasurer if a Supplemental Request has been received. The spreadsheet will be editable, so if you wish to be proactive, you can update it at any time.

SAAC hears supplemental funding requests on Tuesdays at 8:00 PM. The SAAC Calendar can be found on SA Government website. At the Supplemental Hearing, the Student Organization will be given the opportunity to explain the request to SAAC and answer questions. Once the Hearing

moves to Committee Discussion, SAAC will discuss internally (with the organization present) to determine if and how the Supplemental request should be granted.

Supplemental Funding Types:

Program and Competition Supplemental Funding

Program and Competition Supplemental Funding is used to obtain funding for Organization programs and competitions that meet all SA guidelines as described in this manual, as well as Anniversary Funding.

Student Organizations in Preliminary Status are authorized to request Program or Competition Supplemental only.

General Guidelines:

- The same SA organization may only receive Program and Competition Supplemental funding 2 times per year, or \$4,000, whichever occurs first.
- We will cover up to half the cost of travel expenses within a reasonable amount. Lodging costs may be covered up to a reasonable amount.
- We will cover registration fees for competitions up to \$100 per person for 4 people or \$400 total per organization.
- Members of the organization are expected to contribute and pay a portion of the competition expenses.

Organization Anniversary Funding can be requested via the Program and Competition Supplemental funding form for Organization celebrating their 5th, 10th, 15th, etc. year reunion. If the event will be hosted during Meliora Weekend, (program must be listed on the Alumni Advancement Office schedule of events for Meliora Weekend in order to be eligible) up to \$300 can be requested to spend on a reception. These funds will be exempt from the food restriction.

Anniversary events not occurring during Meliora Weekend will be eligible to request up to \$200 to spend on a reception. These funds will be exempt from the food restriction.

ADVISORS: Program and Competition Supplemental requests are typically reviewed and approved by SAAC on Tuesday nights.

Anniversary Funding requests are reviewed and approved by SAAC Leadership.

Club Sports are not eligible for Program and Competition Supplemental Funding, with the exception of Anniversary Funding.

Conference Supplemental Funding

Conference Supplemental is used to obtain funding for members of an Organization to attend conferences that further their organization's Mission. Eligible Organizations must

meet all SA guidelines as described in this manual. On the supplemental request form, provide a detailed response for each field.

Student Organizations in Preliminary Status are authorized to request Conference Supplemental.

General Guidelines:

- Supplemental funding will only cover registration fees of \$100 per person for up to 4 attendees, or a total of \$400 for the organization of members attending. If registration fees exceed this amount, the Organization will have to explain how they intend to cover the additional cost.
- The same SA organization may only receive Supplemental Funding for Conferences once every other year.
- SA organizations may seek partial supplemental funding for reasonable travel and lodging expenses. It is expected that members will contribute to the expenses.

ADVISORS: Conference Supplemental requests are reviewed and approved by SAAC Leadership.

Equipment Supplemental Funding

The equipment supplemental fund is designed for long-term equipment purchases which are not possible through the annual budgeting process. Temporary purchases and recurring equipment purchases should be conducted through the budgeting process and not the equipment supplemental fund. Uniforms and individual-use items (ex: baseball bats) may not be purchased through Equipment Supplemental.

Student Organizations must have adequate storage space available prior to submitting an Equipment Supplemental request. Please work with your primary advisor to begin the Storage process or expand your current storage space.

Safety Equipment can be requested through the Equipment Supplemental Process. When purchasing Safety Equipment, SAAC will generally adhere to the following Safety Equipment Specifications:

- Safety Equipment for Competitive play is classified as equipment such as goalie gear, catcher gear, etc.
- Quantity of fully funded safety equipment will be determined in conjunction with the Club Sports Advisor

ADVISORS: Equipment Supplemental requests are typically reviewed and approved by SAAC on Tuesday nights.

Post-Season Funding

Post Season Competition Funding is available to all SA student organizations and is used for requesting Funds for qualifying activities in the post season (i.e. Nationals, Sectionals, etc.)

We understand the value of organization's competing in post season activities. However, there is a limited amount of funding available for this use.

For this reason, a few guidelines have been set in place to ensure that all SA organizations have equal opportunity to participate in Post Season competitions and to ensure that our limited funding is distributed fairly.

- We will cover up to half the cost of travel expense within a reasonable amount. Lodging costs may be covered up to a reasonable amount.
- Registration will generally not exceed \$400.
- Members of the organization are expected to pay a portion of the competition expenses.

ADVISORS: Post-Season Funding requests are reviewed and approved by SAAC Leadership.

Rental Car Supplemental

It is a general expectation of SAAC that Student Organization's with budgeted travel will have sufficient vehicles to accommodate travel.

However, we are aware that it can be difficult to predict the number of vehicles that will be available for travel each school year or the size/safety of available vehicles.

To minimize the financial impact on Student Organization's that may be facing difficulty finding vehicles for budgeted travel, the SA has created a small pool of funds known as the Rental Car Supplemental Fund.

Submission can be on a case by case basis or can be for the entire school year for budgeted travel.

ADVISORS: Post-Season Funding requests are reviewed and approved by SAAC Leadership.

Club Sports Funding for Away Uniforms

The Club Sports Uniform Fund is able to fund approximately 5 Organizations per year for Away (dark colored) Uniforms. Interested Club Sports must meet with their Primary Advisor prior to submitting a Supplemental form.

Requests will be reviewed by SAAC Leadership with input from Club Sports Leadership. The following items may be taken into account during the decision making process:

- Organization's standing with SAAC, ARC & Club Sports Leadership
- Time that Organization has been active
- Urgency of need for new uniforms
- Quality of information provided in this application

ADVISORS: Post-Season Funding requests are reviewed and approved by SAAC Leadership with input from Club Sports Leadership.

New Coach/Instructor Fund

Volunteer coaches/instructors are no longer permitted, any personnel acting in a Coaching Role, must be on the University of Rochester's payroll. If this is something that your Student Organization would like to apply for, please work closely with your Primary Advisor.

Please note: Student Organizations should attempt to budget for these expenses in future years, as this funding will only be permitted once.

In order to assist with the implementation of this rule, SAAC has set aside a pool of funds for Organizations to apply to for assistance with paying their coach/instructor.

PLEASE NOTE: SAAC will only pay for up to ½ of 1 coach. The remainder of the coach's pay must come from the Organizations income.

ADVISORS: Post-Season Funding requests are reviewed and approved by SAAC Leadership with input from the Primary Advisor.

New Club Sports Supplemental

A new unbudgeted Club Sport may apply for the New Club Sports Supplemental fund. This is to be used a maximum one time per academic year prior to receiving a budget with a maximum of \$1000 awarded to a new Club Sport.

ADVISORS: Post-Season Funding requests are reviewed and approved by SAAC Leadership with input from Club Sports Leadership.

Additional Funding Sources

Gift or Donations

Gifts and donations from parents, alumni, friends, etc. are viable sources of income for any student organization that banks with SOFO. Contributions via check can be written out to *University of Rochester*. If the contributor would like to receive documentation of their tax-deductible donation, please be sure to notify SOFO personnel at the time of deposit.

Any funds deposited through the Alumni & Advancement website, will be automatically deposited into the Student Organization's SOFO account. Gifts and donations may be used as the organization sees fit; such income does not count towards the annual income requirement, unless otherwise indicated.

Each club is expected to write Thank You notes for all donations. Blank Thank You cards can be picked up from SOFO. Please return the finished Thank You Cards to SOFO, with the name of the donor clearly indicated on the envelope, SOFO personnel will address and mail them.

ADVISORS: A gift report will be distributed during the Student Organization Advisor meeting. Please pass the relevant information along to your Student Organization and prompt them to write Thank You cards.

Crowdfunding at the U of R- previously referred to as USEED

SA Recognized Student organizations that wish to raise money via Crowdfunding are required to use the University preferred platform. Donors will receive documentation of their tax-deductible donation from the University's Alumni & Advancement office.

Interested Student Organizations, must first start by discussing with their Primary Advisor.

Use of other crowdfunding platforms will result in the forfeit of any supplemental funding opportunities.

Funding Portal administered by the AS & E Dean's Office

The AS & E Funding Portal was established to assist with the transfer of funds from Departments to Student Organizations.

Funding Portal requests for Student Organizations should occur AFTER funding from SAAC via Supplemental has been attempted.

ADVISORS: Please ensure that the funding requests do not overlap with budgeted line items, if they do, a descriptive explanation must be provided. It is expected that you will respond to Dean's Office's inquiry within 2 business days. Should an overlap in funding requests occur and the explanation is insufficient, the advisor will notify the Funding Portal Administrators immediately

If an organization has already exhausted their 2 supplemental requests or \$4,000 cap (whichever occurs first), they should discuss with their advisor and SAAC accountant whether an exception should be made by SAAC to consider an additional Supplemental request.

Requests submitted through the Funding Portal will be sent to the Primary Advisor for review, prior to distribution to departments.

If an organization is requesting funds from Departments that are not currently included in the Funding Portal, they must submit a list of the contributing departments with their Point of Contact and Financial contribution amount to:

- The funding portal administrators
- Primary Advisor
- SA Staff Accountant

SAAC Exception Form

The [SAAC Exception form](#) should be used for all Student Organizations that would like to request an exception to established Policies/Guidelines.

An informal discussion with your Primary Advisor is required prior to the submission of one of the following Exception forms and multiple Exceptions can be requested at one time.

If your organization would like to request an exception for any of the following items, please formally apply for the exception via the CCC:

- Travel Exception for budgeting travel related expenses outside of the 400 mile radius **For use during Budgeting ONLY**
- Budget Guideline Exception (i.e. would like to request an Exception to an established Budget Guideline)
- Request to Host an Event/Tournament on U of R Campus
- Reallocation of ENTIRE Program budget (i.e. hosting a different Program than the one approved at budgeting with the funds)
- Request an exception to the Maximum Rollover policy (applies mostly to organizations within the Club Sports Category)
- Request an Account type change (convert from Agency to funded or vice versa)

If you are unsure what type of Exception you should be requesting, please work with your Primary Advisor & Student Accountant to determine the appropriate selection.

Appendix A. Funding Principles

The following guidelines shall serve to provide a framework within which the Students' Association Appropriations Committee and Recognized Student Organizations may understand the budgeting and supplemental funding processes. The Appropriations Committee reserves the right to use its discretion at any time.

Student Organizations are urged to speak with their Advisor & SAAC Student Accountant if there are concerns regarding compliance with the Funding Principles. Advisor &/or SAAC Student Accountant may have Organization complete a SAAC Exception form to override an existing Principle as an exception.

SECTION ONE – GENERAL FUNDING PRINCIPLES

- A. SAAC will not fund study breaks.
- B. SAAC will generally not fund programs, competitions or conferences that occur during a break in the academic year.
- C. SAAC will not fund retroactively, nor will SAAC fund for events that will take place before a funding decision can reasonably be made.
- D. SAAC will only consider funding for expenses/programs while classes are in session.
- E. SAAC will consider travel expenses only within the United States.
- F. SAAC will not fund organizations with selective, or exclusive memberships, or who require auditions to gain membership.
 - a. SAAC will not fund events, programs etc. that are not open to the entire undergraduate student population
 - b. All events funded by SAAC must be open to all students, regardless of whether or not they are members of the requesting organization.
- G. Any requests for International Travel to Canada will be removed from Budget and Organization must come up for Supplemental to receive an Exception and Travel process must go through the Global Travel Process.
- H. SAAC will consider funding and allow the use of University resources for Organizations traveling within a 400 mile radius. Any further travel must first be granted an exemption by filing a Long Distance Travel Exception Form.
- I. SAAC will consider funding advertising materials for fundraising within reasonable limits.
- J. SAAC will generally not fund events for which the sole purpose is to promote other events.
- K. SAAC will consider funding refreshments for programs if they are integral to the program, or are cultural or educational in nature. Request must be in line with Organization's mission statement.
- L. SAAC will consider funding refreshments for non-University of Rochester attendees.
- M. SAAC will not fund formal dinners.
- N. SAAC will consider funding Sanitarian fees.
- O. SAAC will consider funding lodging accommodations in hotels only unless alternative lodging is deemed necessary and appropriate at the time of budgeting.

- P. SAAC will generally fund up to \$10 for SAVan use each academic year. Request must be in line with Organization's mission or program needs.
- Q. SAAC will fund Registration fees up to \$400.00 and travel expenses within a reasonable amount.
- R. SAAC will generally not fund t-shirts and other recreational apparel.
- S. SAAC will not budget for discretionary funds, non-specific miscellaneous expenses, emergency cash, petty cash, or non-specific maintenance requests.
- T. SAAC will consider funding gas expenses at a predetermined rate for:
 - a. Student Organizations to travel to approved competitions or programs
 - b. Student Organizations to pick up guest speakers, equipment, food, and other supplies.
- U. SAAC will generally not fund car or van rentals.
- V. SAAC will consider funding advertising if the scale is deemed reasonable and appropriate for the size and purpose of the program.
- W. SAAC will consider funding up to \$300 for decorations in a flat line item at the discretion of the Committee
 - a. Organizations must specify what programs the decorations will be used for.
- X. SAAC will generally not consider funding giveaways. (Gifts certificates, prizes, trophies, etc.)
- Y. SAAC will not fund in excess where a Student Organization can profit.
- Z. SAAC will require organizations that host programs whose expenses exceed \$1,000 to charge an entrance fee for the program unless the Committee deems that the program meets either of the following criteria:
 - a. Cultural or educational in nature
 - b. A demonstration that an entrance fee will materially impair the success of the program.
- AA. SAAC will consider funding live music (e.g. DJ, live band, etc.) for 2 programs each year, up to \$300 per program if it is vital to the success of the program and in line with the Organization's mission. SAAC will not consider funding bonding programs (e.g. retreats, parties etc.).
- BB. SAAC will only consider funding receptions for special programs (such as speakers & Exhibitions). Request must be in line with Organization's mission or program needs.
- CC. SAAC will consider funding consumables (utensils, brushes, paint, etc.) if:
 - a. The items will be used fully by year end,
 - b. The items are safely stored and accessible by only a few members of the Student Organization in a University approved location.
 - c. The items are deemed necessary to the functioning of the organization or program
- DD. SAAC will only require Organizations to budget income that covers costs not funded by SAAC unless stated otherwise.
- EE. SAAC will not fund the purchases of drugs, including, but not limited to alcohol and tobacco.

- FF. SAAC will not fund testing or certifications for organization members, including related travel costs.

SECTION TWO – SPECIFIC FUNDING PRINCIPLES BY CATEGORY

The following guidelines for each category take precedence over the aforementioned principles when they contradict one another.

Awareness Student Organizations

- A. SAAC will not budget for Charitable donations
- B. SAAC will consider funding advertising expenses for charitable events.
- C. SAAC will consider funding all materials for benefit and awareness programs, excluding food.

Community Service Organizations

- A. SAAC will not budget for Charitable donations
- B. SAAC will consider funding advertising expenses for charitable events.
- C. SAAC will consider funding all items for benefit and awareness programs, excluding food.
- D. SAAC will consider funding transportation costs, in excess of \$10 for members of the Student Organization if the destination is in the Greater Rochester Area
- E. Alternative Break Trips will be funded through the Supplemental Funding process set forth by SAAC Leadership and CSN
- F. SAAC will consider funding food, if an event, or outreach program is day long.

Cultural Organizations

- A. SAAC will consider funding all items for dinners, excluding food. Request must be in line with Organization's mission.
- B. SAAC will consider funding culturally relevant food in sample/small tasting amounts, only if it is deemed culturally necessary.
- C. SAAC will consider funding costumes at \$20 per costume for a maximum of 30 members for recognized performance committees. Funding for costumes is not to exceed \$600 total per academic year per parent organization.
- D. SAAC will consider funding up to 3 performances per year for a parent organization.
- E. SAAC will consider funding up to 6 Cultural Awareness events per year.
- F. SAAC will not consider funding the venue or location fee for large scale off-campus programs
 - a. SAAC will consider funding transportation for students attending the event

Intercollegiate Organizations

- A. Department Funded - Organizations that receive significant financial support via a budgeting process from academic departments
 - a. SAAC will consider funding a maximum of two competitions
 - b. SAAC will not consider budgeting equipment or supplies

- B. Non-Department Funded - Organizations that are primarily supported through the Students' Association
 - a. SAAC will consider funding a maximum of 7 regular season competitions
 - b. SAAC will consider funding equipment or supplies in line with Organization's mission or needs.
- C. SAAC will consider funding expenses that may occur when classes are not in session if approved at the time of budgeting.
- D. SAAC will consider funding rental vehicles to transport competition materials.
- E. SAAC will consider funding rental cars for competitions outside the 400 mile radius.

Performance Organizations

- A. SAAC will consider funding up to half of ECM costs at a maximum of \$1,500 in subsidy per event at a maximum of three events.
 - a. Exceptions can be made for events deemed educational in which full cost of ECM will be covered
- B. SAAC will consider funding up to half of instructor fees
- C. SAAC will consider funding \$20 per costume at a maximum of 30 members (\$600) once per year per parent organization.

Student Service Organizations

- A. SAAC will consider funding all items necessary to the operation of the Organization within reason, and with the approval of the Organization's Primary Advisor, SAAC, and SAAC's Primary Advisor.
- B. SAAC will consider budgeting an equipment fund for WRUR not in excess of \$4000. This fund will be used for all facets of WRUR including: FM, Sting, Production, TV, and Engineering. All purchases from this fund must be deemed vital to the functioning of WRUR at SAAC's discretion.
 - a. No individual transactions may exceed \$500.
 - b. Any individual transaction exceeding \$500 will be handled as follows:
 - 1. The transaction will be tracked as equipment,
 - 2. WRUR's Student Accountant and Treasurer must approve any transaction up to, but not exceeding \$1000,
 - 3. Any transaction in excess of \$1000 must be heard by the SAAC Committee.
 - c. WRUR may not exceed \$8000 in equipment expenses per year unless deemed necessary.

Club Sports

- A. SAAC will consider funding up to \$5000 in subsidy.
- B. SAAC will provide up to a \$1 match for every \$1 in dues contributed.
- C. SAAC will consider funding up to 7 events for a competitive club sport if it is not in a league.

- D. SAAC will consider funding all official league events and up to 2 non-league events for competitive club sports.
- E. SAAC will consider funding travel and lodging for up to 2 events for recreational club sports if at least half of the club's membership will attend.
- F. SAAC will consider funding individual registration fees up to \$400 event at a max of 2 events per year for recreational club sports if at least half the team is attending
- G. SAAC will not consider funding individual fees for competitive club sports.
- H. SAAC will set the minimum dues per member at \$0.
- I. SAAC will set the maximum dues per member at 75 percent of the Student Activities Fee.
- J. SAAC will not consider Club Sport requests to convert to an Agency account.
- K. SAAC will not require income besides that of dues.
 - a. Any other sources of income e.g. fundraising, donations, etc. can be used towards meeting the dues requirement.
- L. SAAC will consider funding a team's travel at a predetermined rate within a reasonable amount for a competition.
- M. SAAC will consider funding a team's gas expenses at a predetermined rate for a competition.
- N. SAAC will consider funding a team's lodging expenses within reason.
- O. SAAC will consider a team's historical and current performance when funding expenses for a competition, if applicable.
- P. SAAC will not fund other universities' teams' transportation expenses.
- Q. SAAC will not fund food and drinks expenses for competitions.
- R. SAAC will generally not fund awards for winning a competition which include, but not limited to, trophies and cash prizes.
- S. SAAC will consider up to half of coaching and instructor fees.
 - a. This is capped at a max of \$40 per hour or \$2000 per year for recreational club sports.
 - b. This is capped at a max of \$25 per hour or \$1500 per year for competitive club sports.
- T. SAAC will cap the yearly rollover at a max of \$1000.
 - a. Rollover must be exhausted before a club sport is eligible to apply for Supplemental Funding
- U. SAAC will treat the income requirement of dues as first-in, first-out, where the order of consumption shall be: income, subsidy, excess rollover.

New Club Sports

- A. SAAC will consider funding tournament and competition fees.
- B. SAAC will consider funding a team's travel within a reasonable amount for a competition.
- C. SAAC will consider funding a team's gas expenses at a predetermined rate for a competition.

Appendix B. 2018-2019 Contact Information

SAAC Leadership

Name	Position	E-Mail Address
Robert Gerami	SA Treasurer	rgerami@u.rochester.edu
Maxwell Kearns	SA Deputy Treasurer	mkearns4@u.rochester.edu
Anne-Marie Algier	SAAC Advisor	anne-marie.algier@rochester.edu
Jen Nicholson	SA Staff Accountant	jennifer.nicholson@rochester.edu

Student Accountants & SOFO Professional Staff

Name	Position	E-Mail Address
Onur Bagoren	Student Accountant	obagoren@u.rochester.edu
Grace Conheady	Student Accountant	gconhead@u.rochester.edu
Gregory Harris	Student Accountant	gharr12@u.rochester.edu
Lionel Imena-Kirenga	Student Accountant	limenaki@u.rochester.edu
Annemarie Kearns	Student Accountant	akearns@u.rochester.edu
Kate Lambert	Student Accountant	klamber4@u.rochester.edu
Rita Pecoraro	Student Accountant	rpecorar@u.rochester.edu
	Student Accountant	
	Student Accountant	
	Accounting/Bookkeeper	