Organizations Funding Handbook

The who, what, where, when, why, and how of student organization funding opportunities

University of Wisconsin- Eau Claire Student Senate Organizations Commission
Table of Contents

What are segregated fees? ................................................................. 3
Who is eligible? ............................................................................. 4
What disclosure responsibilities do recipients have? ..................... 5
What rules apply to segregated fee spending? ............................... 6
Prohibited SUF Expenditure ......................................................... 8

Timeline ....................................................................................... 9

Presentation Criteria ...................................................................... 10

Presentation Outline ...................................................................... 11

Fundraising .................................................................................. 12

Questions to Anticipate .................................................................. 13

Other Funding Opportunities ......................................................... 14
Special Allocations ....................................................................... 14
Other Funding Opportunities ......................................................... 14
Student Organization Opportunity Fund ...................................... 15

The Organizations Commission Responsibilities .......................... 16

Resources and Contacts ................................................................. 17
What are Segregated Fees?

Segregated university fees (SUF) are charges, in addition to instructional fees, assessed to all students for student services, activities, programs and facilities that support the mission of University of Wisconsin System institutions. There are two categories of SUF, as follows:

1. Allocable. Allocable SUF are those SUF that provide substantial support for campus student activities and services and are allocated by students in consultation with the chancellor and subject to the final confirmation of the Board of Regents.

2. Non-allocable. Non-allocable SUF are those SUF that are used to support long-term commitments for fixed financial obligations. These you cannot apply for.
Who is Eligible for Allocable Segregated Fee Funds?

Only officially recognized student organizations, and university departments to the extent permitted under the UW System Financial and Administrative Policy G15 on “Student Services Funding,” are eligible to receive allocable SUF.

Student organizations must meet the following minimum requirements to obtain official recognition:

a. Organizations must be in “good standing” as defined in the Student Senate bylaws:

b. Organizations must meet the following requirements to be considered in “good standing”:
   (1) Update organization’s constitution that meets requirements as established by the Organizations Commission (refer to “Constitution Requirements” document)
      a. Needs to be updated every 2 years by the first Friday in December
   (2) Up-to-date contact information for at least the primary and secondary contacts, treasurer, and University of Wisconsin-Eau Claire faculty/staff advisor
      a. Contact information must be updated each year by the first Friday in October and the first Friday in February of each academic year
   (3) Attend annual Mandatory Workshop
   (4) Maintain University of Wisconsin-Eau Claire faculty or staff advisor

If applying for funding, organizations must abide by the following:

(1) Be a recognized student organization and in continuous good standing for 12 months
(2) Must be in good standing at the time of application for funding
(3) Must have a campus account established prior to applying for funding (i.e. letter of intent or application)
(4) If, at any point, between an organization’s application for funding and July 1st of the following fiscal year an organization’s good standing is revoked, the organization is no longer qualified to receive its previously approved funding.

c. Be organized on a not-for-profit basis, as demonstrated by evidence that the organization uses any income or profit for organizational purposes, not for any individual or commercial gain;

d. UW System institutions may establish additional requirements for official recognition consistent with this policy.
What Disclosure Responsibilities Do Recipients Have?

Reporting student organization financial information: Student organizations are required to comply with requests for financial information in the circumstances in (a) and (b) of this section. An organization’s failure to comply with a request for financial information may result in the denial of eligibility to receive SUF and/or the use of university facilities.

a) All student organizations receiving allocable SUF or using institutional facilities must provide financial records, if requested by SUFAC or by the institution, indicating specific revenues and expenditures for specific events for which SUF support or the use of university facilities was provided.

b) Where allocable SUF are received for ongoing operations or activities of an organization in accordance with this policy, the organization must provide financial records of its entire operation, when requested by the SUFAC or by the institution.

c) Failure on the part of a student organization to provide financial information in accordance with this policy may result in suspension or loss of recognition, and privileges associated with recognition.
What Rules Apply to Segregated Fee Spending?

Permitted SUF Expenditures: Except as limited elsewhere by law or policy, SUF may be assessed and collected for the following:

(a) Travel expenses. In accordance with applicable state and UW System travel regulations, any admissions and registration expenses incurred by UW staff or students are allowed for the following:

1. Attending educational, cultural, social, recreational, or university athletic events.
2. Recruiting students for musical groups, theatrical groups, or publication writing, and the like.
3. Representing the institution or a recognized student organization in the operation and fulfillment of the mission of the student organizations, student service operations, and student government, subject to approval by the chancellor or his/her designee.
4. Recruiting athletes, as allowed by conference or membership affiliation.
5. Busing students within the campus. Payments for bus services that extend beyond the campus boundaries must be approved by the Chancellor or his/her designee.

(b) Expenses related to educational, cultural, social, and recreational activities for:

1. Personal or professional services (e.g., concert performers, bands, officials, lecturers, and other performers); reimbursement for such services provided by UW System faculty or staff may be made in accordance with the provisions of UW System Financial and Administrative Policy (FAP) F31 on "Personal Services Payments" and Academic Planning Statement #4.
2. Meals, receptions, and transportation incurred by UW faculty or staff or students while performing a host function for a guest speaker, performer, etc., brought to the campus for a SUF funded activity, if such expense was part of the budget approved for the activity.
3. Production of an event (e.g., films, advertising, promotion, printing, facilities rental, ushers, and security guards). On-campus facilities (buildings and grounds) must be used whenever possible. Exceptions require the prior approval of the Chancellor or his/her designee.
4. Trophies, medallions and other types of awards for student competitive functions, scholastic excellence, or outstanding school/community service, and funding of athletic or honor banquets or receptions subject to the following guidelines:
   i. If the organization holding the banquet or reception or presenting the awards receives any SUF support, the institutional SUFAC must specifically approve the expenditure as part of the allocable SUF budget prior to the event.
ii. Cash or product awards in excess of $100 but less than $500 may be given only upon prior approval of the Chancellor or his/her designee. Those in excess of $500 must be approved by the UW System Vice President for Finance.

(c) Student media expenditures for:
   1. Publishing student newspapers, yearbooks, magazines, paid admission event programs, and other print media. (Student publications are exempt from the state printing regulations per Section 35.012 Wisconsin Statutes. However, they are not exempt from the regular purchasing regulations in Section 16.70.)
   2. Operating student radio and television facilities.
   3. Student film and videotape productions.

(d) Officially recognized athletic program expenditures for:
   1. Uniforms, athletic equipment, travel, supplies and personal services.
   2. Athletes' housing and meals prior to opening of a semester or during vacation periods.
   3. Grants-in-aid as allowed by conference or membership affiliation.
   4. Medical expenses for an athletic injury incurred while participating in an officially recognized athletic event. Injuries related to intramurals, open gym periods, club sports, and student-sponsored athletic events are not covered. (Information on student health insurance is available from the Institution's Risk Management Office.)

(e) Expenditures relating to the operations and activities of student organizations, student health services, day care centers, union student center, parking utility, stadium-arena, intramurals, and other student services for:
   1. Salaries for student and other UW staff where related to the activity and in accordance with existing institutional and state wage rates and employment procedures. Payments shall be made in accordance with the provisions of the UW System Financial and Administrative Policy F31 on “Personal Services Payments.”
   2. Professional services.
   3. Facilities, equipment, personal services, and supplies. Organization membership fees in other related and nonprofit organizations.
   4. Debt service.

(f) Promotional items such as matchbooks, key rings, pencils, etc., used to promote an organization's single event or services, provided they are approved through the SUF allocation process.

(g) Special and ceremonial campus activities in which students are primarily involved provided they are approved through the SUF allocation process.
Prohibited SUF Expenditure:

In addition to other limits established by law or policy, SUF shall not be assessed or charged for:

(a) Academic credit-producing activities;
(b) Student services determined to be essential to the basic mission of the university, as identified in the UW System Financial and Administrative Policy G15 on “Student Services Funding.”
(c) Normal campus-wide activities and functions that service the entire institution, such as campus-wide, centrally provided physical plant and institutional support.
(d) Direct financial aid to an enrolled student such as scholarships, tuition, room and board, but excluding child care payments.
(e) Gifts, donations and contributions.
(f) Awards to UW faculty or staff, other than non-monetary, *de minimis* items such as certificates, plaques and the like.
(g) Costs of legal services, except where the governor has approved hiring an attorney to provide student legal services at an institution.
(h) Lump sum payments to student organizations (as opposed to payments for specific purposes supported by invoices).
(i) Contracts between a UW institution and a recognized student organization.
(j) Overhead costs of student organizations in facilities not owned, leased or subject to control by the university. As used in this section, overhead costs means those general organization expenses which cannot be charged as belonging exclusively to any particular part of the organization’s activities or work, including without limitation because of enumeration, salaries of the organization’s employees who are not UW employees, rent, taxes, insurance, lighting, heating and similar expenses.
### Timeline

**Current Timeline**

<table>
<thead>
<tr>
<th>Date</th>
<th>What is Due</th>
<th>Where/Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 15 (will be extended to April 20)</td>
<td>Letter of Intent</td>
<td>Email to Organizations Director at <a href="mailto:Organizations@uwec.edu">Organizations@uwec.edu</a></td>
</tr>
<tr>
<td>October 10</td>
<td>Budget Proposal and Packet</td>
<td>Email to Organizations Director at <a href="mailto:Organizations@uwec.edu">Organizations@uwec.edu</a></td>
</tr>
<tr>
<td>October</td>
<td>Sign up for presentation time</td>
<td>Senate Office Davies 222</td>
</tr>
<tr>
<td>October 12</td>
<td>Budget Hearings &amp; Presentations with Organization Committee</td>
<td>TBD Notified via email</td>
</tr>
<tr>
<td>October 28</td>
<td>Organizations notified of Tentative Budget Requests</td>
<td>Notified via email</td>
</tr>
<tr>
<td>November 9</td>
<td>Appeal Request Submitted to Finance Commission</td>
<td>Instructions to appeal in Tentative Budget Request email</td>
</tr>
<tr>
<td>November 16</td>
<td>Appeal Hearings with Finance Commission</td>
<td>Location and Time TBD, notified via email, sign – up in Davies 222</td>
</tr>
<tr>
<td>February</td>
<td>Final Budgets Approved by Student Senate and Chancellor</td>
<td>Notified via email</td>
</tr>
</tbody>
</table>

***Timeline to be adopted for the 2013-2014 Fiscal Year Process to begin on first Friday in March in 2013***

<table>
<thead>
<tr>
<th>Date</th>
<th>What is Due</th>
<th>Where/Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Friday in March</td>
<td>Petition of Intent</td>
<td>Submit in OrgSync portal</td>
</tr>
<tr>
<td>1st Friday in April</td>
<td>Budget Proposal and Packet</td>
<td>Submit in OrgSync portal</td>
</tr>
<tr>
<td>3rd week in September</td>
<td>Sign up for presentation time</td>
<td>Student Senate Office Davies 220</td>
</tr>
<tr>
<td>Last week in September of first week in October (Not the same week as Homecoming)</td>
<td>Budget Hearings and Presentations to Organizations Commission</td>
<td>TBD Notified via email</td>
</tr>
<tr>
<td>Last Friday in October</td>
<td>Organizations notified of Tentative Budget Requests</td>
<td>Notified via email</td>
</tr>
<tr>
<td>2nd week of November</td>
<td>Appeal Request Submitted to Finance Commission</td>
<td>Location Time TBD notified via email sign-up in Davies 220</td>
</tr>
<tr>
<td>Late November or Early December</td>
<td>Appeal Hearings with Finance Commission</td>
<td>Location and Time TBD Notified via email Sign-up in Davies 220</td>
</tr>
<tr>
<td>February</td>
<td>Final Budgets Approved by Student Senate and Chancellor</td>
<td>Notified via email</td>
</tr>
</tbody>
</table>
Presentation Criteria

- Business casual recommended
- Be prepared for your presentation
- Be punctual
- PowerPoint or handouts recommended
- Have a budget prepared outlining where the money will be allocated
- Keep summary of your organization brief
  - We know what your group is and what your group does, the commission would like to hear how your organization would allocate the money
- Focus on your budget
- Know the rules regarding where this money can be spent (see pages 7-9)
- Be prepared to answer questions from the committee (do not be intimidated)
- Use respectful language
- Ensure that the persons presenting have knowledge of the budget and can answer questions regarding the funding request in an accurate manner
  - 10 minutes will be allotted for the organization to present, in addition, there will be 5 minutes at the end for the Organizations Commission to ask questions.
- Bring a smile
Presentation Outline

• 15 minute time slot
  o 10 minutes total to present
    - 5 minutes for questions from the commission
  o
• Organization Advisors cannot present, but can be in attendance to help answer questions.

• What information should be in the presentation?
  o What is the organization?
  o How large is the organization?
  o How have you funded your organization in the past?
  o What fundraising efforts has the organization undertaken?
  o How has the organization demonstrated fiscal responsibility in the past?
  o What plans does the organization have to increase revenue in the future?
  o What is this money specifically being allocated for?
    ▪ (i.e. travel, uniforms, special events, etc.)
  o What community/university involvement(s) does the organization have?
  o What goals does your organization have that will benefit the university?
Fundraising

4.6 Fundraising Policy (from Student Organizations and Advisor’s Handbook)
Student organizations are allowed to fundraise for their organization both on and off campus so long as fundraising events follow all university, city, county, state, and federal rules and laws.

Student organizations fundraising on campus may be subject to facility and/or equipment rental fees depending on the nature of the fundraiser and the space required. All events that generate revenue will be charged such fees, with the exception of bake sales.

If an organization is sponsoring an outside vendor to sell products or services, vendors shall not be allowed to sell items in competition with any University Centers contracted vendors, including Blugold Dining, the University Bookstore, and US Bank. In addition, sales of tobacco, alcohol, or items that can be found in University Centers vending machines are not allowed. For more information about restricted sale items, please contact the University Licensing Manager.

Organizations wishing to sell food or beverage should refer to the Student Organization and Advisor Handbook for the Food on Campus Policy (Section 4.3) and Hosting a Bake Sale (Section 5.8).

Organizations may not use the University’s tax exemption status for any fundraising efforts.

Organizations needing a tax identification number for fundraising purposes may apply through the Internal Revenue Service.

Organizations will not use funds collected from the Student Organization Segregated Funding award to purchase alcohol that can only be consumed by members who are of legal drinking age and to purchase promotional materials for unofficial events that can only be attended by those of legal drinking age.
Questions to Anticipate

Questions from the commission to the presenters

*This is a general selection of potential questions – depending upon the information you provide there may be other questions that arise

- What are current outside funding sources? (i.e. sponsors, donations, membership dues, departments, programs, etc.)
- What are you doing to make your spending more efficient?
- What are the individual costs for members?
- What alternative funding sources have you looked into?
- What aspects of your budget are future estimates or documented expenditures?
- What fundraising has the organization done?
- How does your organization advance the University’s goals and values?
- What goals do you have to better your organization and/or grow in members?
Other Funding Opportunities

Special Allocation Requests
Organizations that are eligible to receive student segregated fee money. Organizations that have not been deemed eligible must co-sponsor the event with an eligible organization or department in order to receive funding. Special allocations requests must meet three criteria:
1. The project must benefit the campus community
2. The project must be a one-time event
3. The project must attempt to economize expenses

Process
Pick up a special allocation request from Davies 220 and submit completed form to the Director of Finance. The Finance Committee will review it and either approve or deny. Approved allocations will then go to Student Senate for a vote.

Funds available immediately.

Forms: Found in Student Senate Office (Davies 220)
Contact Information: Finance Commission – Finance@uwec.edu

Student Senate Green Fund
Organizations that wish to implement projects relating to campus sustainability.

Process
Request for proposals can be made throughout the school year.

Funds available immediately.

For information contact the Student Office of Sustainability (SOS)

Forms (same as segregated fees): http://www.uwsa.edu/fadmin/fppp/fppp50.htm
Contact Information: Student Office of Sustainability – sos@uwec.edu
**Student Organization Opportunity Fund**

What is the Student Organization Opportunity Fund?

- The Student Organizations Opportunity Fund is comprised of donations to the University of Wisconsin-Eau Claire Foundation intended to benefit UW-Eau Claire student organizations by providing the support they need for a variety of activities. This money is intended for the purposes of benefitting the members of your organization, UW-Eau Claire students, faculty, staff and/or the Eau Claire community at large. Possibilities for uses of this funding include community service, projects, programs, activities, travel, seminars, conferences, and supplies.

- Priority will be given to:
  - Projects, events, and activities that emphasize diversity and inclusivity
  - Organizations that have limited ability to obtain additional funding from other sources
  - Applications that are clearly and neatly written
  - Applications that address all questions and requirements
  - Organizations with an updated OrgSync profile, including an updated constitution (every two years, due first Friday of December)

- How to apply for Student Organizations Opportunity Funding?
  - Application is available on Student Orgs Website, under Funding and Forms Sections
    - Application deadlines will be posted on Student Organizations Website

- A maximum of **$250** can be allocated to offset the expenditures of an organization.

- For expenditures related to travel and programs of the organization.

- This is a reimbursement process.
  - Applications are reviewed by the Student Organizations Commission
  - Organizations receiving funding must provide a Post-Event evaluation, along with a treasurer’s report and all receipts, and submitted to Davies 220
Organizations Commission Responsibilities

1. To be a resource and channel to Student Senate.
2. To help answer any questions that any organizations’ and their members may have about the funding process.
3. To provide information, whether through email or paper mail, in a timely manner as to help organizations receive information with plenty of time to complete the required tasks.
4. To be available and timely in answering any questions organizations may have.
5. To make sure that all organizations have been provided with sufficient amount of information to go through the budget funding process in a smooth manner.
Resources & Contacts

Organizations Commission Director
Desk/Mailbox in Student Senate Office
organizations@uwec.edu

Finance Commission Director
Desk/Mailbox in Student Senate Office
finance@uwec.edu

Student Office of Sustainability Director
Desk/Mailbox in Student Senate Office
sos@uwec.edu

Student Senate Program Assistant—Colleen Bader
Davies 220 B
badercb@uwec.edu
(715) 836-4646

Organizations Coordinator—Joseph Haferman
Davies 222B
hafermjl@uwec.edu
(715) 836-4419

Student Organizations Complex Manager—Sara Thommesen
Davies 222E
thommese@uwec.edu
(715) 836-4020

Assistant Chancellor for Budget and Finance—David Gessner
Schofield 101
gessnedp@uwec.edu
(715) 836-5182

Director of Business Services—Mark Reeves
Schofield 102
reevesmt@uwec.edu
(715) 836-2517

Budget and Policy Analyst—Dorothy Nelson
Schofield 101
nelsondo@uwec.edu
(715) 836-5182