Article 5. SUF Budget Process

Section 5.01: Outline of Process

The process the Finance Commission shall use to develop a SUF allocation recommendation for consideration by the Student Senate shall proceed according to general order listed below, with the specific steps described in further detail in subsequent sections of this article.

- Send budget instructions to each Organized Activity.
- Assign Commission members to serve as budget consultations for each Organized Activity. The consultations are to meet with a representative from each Organized Activity about budget plans and to report back to the full Commission.
- Designate a tentative funding target and fee rate for the total Organized Activities Budget for the next year to use as a guide during budget deliberations.
- Establish and publicize a schedule for budget hearings.
- Hold budget hearings.
- Hold budget deliberations and vote on a tentative budget level for each Organized Activity.
- Review budget recommendations relative to the tentative funding target and fee level and adjust if necessary.
- Notify each Organized Activity of its tentative budget recommendation and of the deadline for filing an appeal request.

Section 5.02: Student Organization Fund

(5.02.1) Each fiscal year, the Finance Commission shall allocate SUF monies to a Student Organizations Fund (hereafter, the SOF) as a subset of its overall Organized Activity Budget. The SOF shall be allocated no less than 0.5% and no more than 1.0% of the total previous academic year’s segregated fee receipts.

(5.02.2) Any Organized Activity being placed in the Student Organization category (detailed in Article 7.02) shall derive any direct SUF support from this fund through the following process.

(5.02.3) This fund shall be supported primarily by dedicated segregated fees, but may be supplemented via allocations from the special reserve or carryover balances.

(5.02.4) The initial recommendations for allocating the SOF shall be conducted by the Organizations Commission of Student Senate. Organized Activities in the Student Organization category must submit budgets according to the procedures outlined in the Organizations Commission bylaws.

(5.02.5) The Organizations Commission shall read, investigate, hold hearings, take notes and minutes, and deliberate on the budgets submitted by the organizations. The Finance Director and another member of Finance Commission must be present for these hearings. The other attending member of Finance
Commission should be a non-senator if the Director is a senator, or a senator if the Director is not.

(5.02.6) Any and all Organizations Commission bylaws pertaining to SUF funding hearings must be approved by both the Finance Commission and the Student Senate. If any policies or bylaws are not approved by the Finance Commission or other issues arise, the delegation of this authority to oversee the SOF may be removed at the vote of 2/3 of total voting Finance Commission members. The two Finance Commission members attending the Organizations Commission shall be voting members of the Organizations Commission for the budget process.

(5.02.7) All motions, discussion and voting must be conducted in a Viewpoint Neutral manner in accordance with Finance Bylaws Article 4.02.

(5.02.8) The Organizations Commission Director shall make a presentation to the Finance Commission the Spring semester following the during Budget Hearings, in which he or she will present the entire SOF proposal from the Organization Commission including the overall and which includes individual allocations. The Director will be called upon to answer any and all questions regarding student organizations and their budgets at this time. The Finance Commission Director, in consultation with the Organizations Commission Director, shall determine an adequate time to present and be questioned for the SOF proposal.

(5.02.9) In accordance with open meetings law, any student organization which wishes to be present in the gallery may also answer questions regarding their student organizations budget at the discretion of the Finance Director, though may not present the SOF proposal.

(5.02.10) The Organizations Commission Director must make a recommendation on individual student organizations as well as an overall spending amount. The Organizations Commission must make a recommendation at or below the 1.0% of previous academic year’s segregated fee receipts SOF level proposed by the Finance Commission. Any remaining SOF funds that are not allocated in the budget shall be returned to the Organized Activities clearing account (also known as contingency fund).

(5.02.11) The Finance Commission Director shall transmit budget instructions and notifications of all budgetary decisions regarding Student Organizations to the Organizations Commission, its director, the student organizations President and Treasurer (or similar positions) and each organizations advisor.

(5.02.12) Any appeals made through this process will be made on behalf of the student organization and its leaders directly in the appeal process and not through the Organizations Director. Additionally, appeals to Student Senate or the Chancellor will be at the discretion of student organization leaders and their advisor(s) and not the Organizations Director. The Finance Commission may exceed the SOF limit in appeals by majority vote.

(5.02.13) Any special allocation requests shall be presented directly to the Finance Commission and they shall determine if the funding source should be the SOF, carryover balances, the special reserve, or other revenue streams.
Section 5.03: Budget Instructions

The Commission shall, with the help of the University’s Budget and Finance Office, provide and distribute instructions for the preparation and submission of budget request for the next year to all Organized Activity representatives in the Campus Media and Supplemental Services categories.

(5.03.2) Organizations Commission, with the help of the University’s Budget and Finance Office, will distribute instructions for the preparation and submission of budget requests to all Organized Activities in the Student Organization category in the manner outlined in the Organizations Commission bylaws.

Section 5.04: Budget Consultations

(5.04.1) The Finance Director, after considering the organization assignment preferences of each Commission member and at least four weeks prior to the Commission’s budget hearings, shall appoint each Commission member, including the Director, to budget consultation groups assigned to specific Organized Activities.

(5.04.2) Prior to the budget hearings, each commission member, as assigned by the Finance Director, must meet with a representative of each its assigned Organized Activity to discuss the status of the current year’s budget and the budget plans for the next year in terms of its strengths, weaknesses, and progress.

(5.04.3) Prior to the budget hearings, each voting member must brief the Commission on the meetings with each Organized Activity and the strengths, weaknesses, and progress of the organization’s budget.

Section 5.05: Tentative Funding Target

(5.05.1) The Commission shall, at least two weeks prior to the budget hearings, adopt a tentative funding target for the total Organized Activities Budget for the next year to use as a guide during budget deliberations.

(5.05.2) In establishing a tentative total funding target for the next fiscal year, the Finance Commission shall consider the following:

- The total of the last adopted Organized Activities Budget.
- Anticipated base adjustments.
- Any amount the Commission would add or subtract from the SUF carryover balance.
- Previously adopted minimum allocations.
- Estimated student enrollment for the next year.
- Estimated inflation appropriate for the mix of existing activities.
- UW System fee increase guidelines.
- Estimated increases in academic tuition and other fees.
Students’ ability to pay.
Any other related factors the Commission deems appropriate.

Section 5.06: Hearing Schedule

The Finance Director, at least six weeks prior to the Commission’s scheduled budget hearings, shall notify in writing each Organized Activity representative of the scheduled dates and times of the budget hearings and request that each representative, within two weeks, inform the Finance Director of any date and hearing time preferences their activity may have.

Section 5.07: Scheduling of Hearings

The Finance Director shall, by March of each year, reserve the necessary facilities for budget hearing by the first week in November. The Finance Director, after due consideration of all organizations’ hearing preferences and at least one week prior to the budget hearings, shall schedule each Organized Activity for a specific hearing time before the Commission and shall notify in writing each activity, the Senate and its officers, each Finance Commissioner, the Chancellor, the Advisors, and campus media of the complete schedule of budget hearings, including an explanation of hearing format and time limitations.

Section 5.08: Budget Requests

(5.08.1) Budget requests shall be submitted in writing and shall include 1.) a budget worksheet consisting of the current year’s estimated budget, the previous year’s actual budget and a three-year plan and 2.) a narrative detailing the increases/decreases of the proposed budget, any capital improvements to come, and a description of how the current year’s budget is progressing and 3.) A clear itemized report of all revenue streams from any source. Incomplete requests will be returned to the Organized Activity to be completed and resubmitted by a date determined by the Finance Director. Completed requests not turned in by the specified due date will not be accepted. 4.) a copy of the previous Fiscal Year’s expenditures from the organization’s 128 account as provided by UWISDM.

(5.08.2) Upon receipt of all written Organized Activity budget requests or by the Commission’s established deadline for submission of budget requests, whichever occurs first, the Finance Director shall notify in writing the Senate and its officers, each Finance Commissioner, the Chancellor, the Advisors, and campus media of the following:

- Allocation requests and actual allocations for each activity for the previous and current fiscal years.
- Allocation requests of each activity for the next fiscal year.
- Organized Activities portion of the segregated fee for the previous and current fiscal years.
Section 5.09: Late Budget Request Submissions

Budget proposals are to be submitted by the close of business on the day stated in the budget instructions and calendar. Exceptions may be made at the discretion of the Finance Director with counsel from the Commission Advisors.

Section 5.10: Distribution of Requests

Each Organized Activity presented to the Finance Commission shall provide sufficient copies of its budget request to provide for the following distribution: one copy to the Finance Director; to each Commissioner member; to the President, Vice President, Senate Program Assistant; to the Chancellor, the Advisors; and a minimum of two copies to be available in the Senate office for inspection by Senators, Senate officers and interested students.

Section 5.11: Budget Hearings

(5.11.1) The primary purpose of budget hearings before the Commission shall be to further the information gathering of Commissioners and Student Senators and to provide an opportunity for Organized Activity representatives to make oral budget presentations, offer additional justification for the proposed budget and respond to questions of the Commission members.

(5.11.2) Each Organized Activity shall receive twenty minutes to present its request to the Commission. This time may be divided in any proportion between presentation and answering questions from the Commission members. A majority vote of Commission members may extend the time allotted for any Organized Activity.

Section 5.12: Budget Deliberations

(5.12.1) The Finance Director and each Commission member shall develop an individual set of allocation recommendations prior to the Commission’s deliberations after hearings. The tentative funding target shall be used as a guideline in the development of such individual recommendations, and each Commission member’s recommendations shall balance to the tentative funding target.

(5.12.2) Each Organized Activity shall be discussed individually in turn, with the order determined by the Commission or the Finance Director. With each Organized Activity, the Commission member(s) who recommended the highest allocation shall give his or her rationale for doing so. Then the Commission member(s) who recommended the lowest amount shall be given the same opportunity to provide rationale. The floor will then be opened to discussion on the amount that the Organized Activity requested. Pertinent discussion topics include, among others, the organization’s compliance with criteria for recognition as an Organized Activity; budget management competence; quality of services provided to students; and relation of the organization to the mission
of the University. At the end of discussion for each Activity, a motion may be offered by a Commission member proposing a recommended funding level for the Activity. The motion may be for any dollar amount equal to or less than the level requested by the Activity. This motion must be seconded but cannot be amended. For a different funding level to be considered, the first motion must be voted down.

(5.12.3) After the preliminary allocation recommendations are set by vote of the Commission and before deliberations have concluded, any Commission member may offer a motion to revisit any Organized Activity’s budget. Reconsideration of the preliminary funding level shall occur only if such a motion is seconded and approved by vote of the Commission.

(5.12.4) The Commission shall review the sum of all tentative Activity funding recommendations relative to the total Target Funding Level previously set, and any Commission member may offer a motion to re-open discussion on the Target Funding Level.

(5.12.5) Once all preliminary budget recommendations are in place and the funding target has been adjusted, if necessary, the Commission shall establish 3-year minimum funding levels for Athletics and Recreation, as required by System policy.

Section 5.13: The Tentative Recommendations

(5.13.1) Following all budget hearings and Commission budget deliberations, the Commission shall adopt the tentative recommendations for Organized Activities allocations and the three-year minimum allocations for Athletics and Recreation.

(5.13.2) Immediately following Commission adoption of tentative recommendations, the Finance Director, in writing, shall:

Notify the official representative of each Organized Activity which presented to the Finance Commission of the Commission’s tentative allocation recommendation for that activity, the method and deadline for appealing the Commission’s decision, and the date, time, and location scheduled for appeal hearings, if any.

Notify the Senate and Senate officers, the Chancellor, the Advisors, and campus media of the tentative recommendations of the Finance Commission and the date, time, and location scheduled for appeal hearings, if any.

(5.13.3) Immediately following the Commission adoption of tentative recommendations, the Organizations Commission Director, in writing, shall notify the official representative of each organization applying to the Student Organizations Fund their tentative recommendation amount, the method and deadline for appealing the Finance Commission’s decision, and the date, time, and location for appeals hearings, if any.