FUNDING PROCESS HANDBOOK

Funds for the 2017-2018 Academic Year

A WORD FROM THE COMMITTEE ON BUDGET AND FINANCE

Dear Texas Tech Student Organizations,

Each year the Student Senate Committee on Budget and Finance is tasked with allocating a portion of the Student Service Fees to eligible Texas Tech Student Organizations. We allocate this money according to the guidelines and processes outlined in the Funding Process Handbook. In order for your organization to receive funding, we need you to do the following:

- ❖ Update OrgSync to include current organization and officer contact information
- ❖ Double check that you are registered as a Student Organization and have met your Risk Management training with the Center of Campus Life
- ❖ Check OrgSync as often as possible for reminders of upcoming dates and deadlines
- ❖ Remember to submit an online copy of your funding application to OrgSync.

Funding Process:
After all applications have been submitted, the committee will then hold interviews for each organization that has applied. Following the conclusion of the interviews, the Budget and Finance Committee will meet to allocate funds to each organization based on criteria dictated in the Funding Process Handbook. This allocation will then be drafted into the Senate Bill that will be entitled "The 2017-2018 Student Organization Funding Bill" that will undergo three separate readings in the Student Senate. A "reading" simply opens up the funding bill to edits and discussion, although formal changes will only be permitted on the dates for second and third reading. All Student Senate meetings are open to the public.

Upon passage of the bill, the included organizations will officially be funded for the 2017-2018 academic year. All information, dates, and deadlines for the process outlined above will be communicated through OrgSync, TechAnnounce and SORC Meetings. Each Student Organization is responsible for staying up to date with the deadlines.

We, the Committee on Budget and Finance, are excited to serve the students this upcoming year and look forward to having another successful year. If you have any questions feel free to come up to the SGA office, SUB Room 302 or call us at 806-742-3631, or email the Chair/Vice-Chair of the Committee on Budget and Finance. We understand that it is unreasonable to expect success without growth, and we're here to help your organization both grow and succeed!

Sincerely,

Farah Mechref   Robert Meyer
Chairman   Vice-Chairman
Budget & Finance Committee   Budget & Finance Committee
Farah.mechref@ttu.edu   robert.meyer@ttu.edu

Updated Calendar of Events

Funding Request Process Begins..Tuesday, September 12, 2016
Online via OrgSync: http://ttu.orgsync.com/   8:00 AM

SORC Meetings

Information regarding applying for SGA funds for 2017-2018 will be distributed online at www.sga.ttu.edu and through your individual SORC meetings. This information can also be obtained from the SGA website at http://www.depts.ttu.edu/sga/SORC.php. Please make sure your organization's SORC Representative or another officer attends every SORC meeting scheduled. These meetings are one of the best ways to stay informed about what is going on with the allocation funding process. Attendance will be taken at the end of each SORC Meeting by your organization's Category Coordinator, which will be used to apply various bonuses to your organization's allocation (if our funding permits) and may be taken into consideration during allocation weekend.

Process Deadlines

New Budget Application Due **(without penalty)** ....Friday, December 23, 2016
Online at http://ttu.orgsync.com/   by 5:00 PM

New Budget Application Due **(with 20% penalty)** ....Monday, January 23, 2017
****NO APPLICATIONS WILL BE ACCEPTED AFTER THIS DATE****

Funding Interview Sign up Deadline **(without penalty)** ....Monday, January 23, 2017
Online at http://ttu.orgsync.com/   by 5:00 PM

Funding Interview Sign up Deadline **(with 20% penalty)**.............................Monday, January 27, 2017
Online at http://ttu.orgsync.com/   by 5:00 PM
****NO ORGANIZATION MAY SIGN UP AFTER THIS DATE****

Attend Funding Interview (January 30 – February 10, 2017) .... *Your Assigned Date*
SGA Office Conference Room, Room 302, Student Union Building   *Your Assigned Time*

Senate Readings of Appropriations Bill

First Reading of Appropriations Bill..Thursday, February 23, 2017
Room 353, Media & Communications College   6:00 PM

Second Reading of Appropriations Bill .... Thursday, March 2, 2017
Room 353, Media & Communications College   6:00 PM

Third Reading/Final Passage of Appropriations Bill .... Thursday, March 30, 2017
Room 353, Media & Communications College   6:00 PM

THE FUNDING PROCESS

Please read all of the following material carefully!

Budget & Finance Committee

The Budget & Finance Committee is composed of 13-15 Student Senators from various colleges and classifications. For Graduate Organizations, there is a subcommittee comprised mostly of graduate students that meets to allocate funds. The account manager for Student Government also sits on this committee in an ex-officio capacity to serve as an advisor. Membership on this committee is not necessarily consistent from year to year. The committee is tasked with conducting the funding process and ensuring that funding is distributed fairly.

Organization Eligibility

An organization is eligible to receive funding if it meets the following criteria:
- Membership is open to TTU students and not restricted based on anything other than GPA, college and classification (i.e. race, religion, gender, sexual orientation, physical or mental disability, national origin, or Vietnam era or special disabled veteran status).
- Currently registered and in good standing with the Center for Campus Life by Friday, December 23, 2016 at 5:00 p.m.

Organizations *NOT* eligible for funding include, but are not limited to, the following:
1. Any organization not registered with the Center for Campus Life.
2. Any organization that can be, by virtue of its purpose, funded by other Student Affairs Department (e.g. Center for Campus Life, Rec Center, Student Media, etc.)
   a. Club Sports/Teams
   b. Intramural Sports
   c. Publications (e.g. newspapers, magazines, etc.)
3. Organizations receiving funding directly from Student Service Fees

Special consideration will be given to organizations that:
- Bring recognition to Texas Tech University
- Involve recruiting activities
- Promote diversity on campus
- Provide support for continuing projects
- Provide support for speakers
- Provide support for conventions
- Provide support for cultural events
- Enhance the image of Texas Tech University

These priorities are to be construed broadly in scope and may overlap. Funding for an organization may be denied due to a lack of educational merit and benefit to the community.

Budget Process

Required Steps to Receive Funding:
1. Attend a FY17 SGA Funding Training Session, and make sure your organization is registered, met Risk Management requirement and in good standing with the Center for Campus Life.
2. Fill out and submit application packet to OrgSync by 5:00 p.m. on Friday, December 23, 2016
3. Schedule **AND** attend a Funding Interview with the Budget & Finance Committee

Funding Request Packet

The Funding Request Packet is the packet that student organizations will submit to the Committee on Budget and Finance for review. Organizations must submit the completed Funding Request Packet online at ttu.orgsync.com by **5:00 PM on Friday, December 23, 2016**.

Each organization's New Budget Application should include:
1. **Completed Online** New Budget Application
2. **One (1) Electronically Signed** Funding Contract *(MUST be electronically or manually signed by all three people named on the form)*
3. Any supporting materials (Optional)

Budget Preparation Assistance

If you require any assistance in preparing the New Budget Application, or if you have any questions regarding the funding contract, feel free to come up to the Student Government Association office in room 302 of the Student Union Building for help. Additionally, feel free to email the Chair or Vice-Chair of the Budget & Finance Committee with questions or set up a one-on-one preparation meeting.

Effective September 12, 2017:
*Organizations who fail to turn in a New Budget Application by 5:00 p.m. on Friday, December 23, 2016 will receive a 20% deduction (at the discretion of the committee) from the Budget & Finance Committee's recommended allocation. Failure to turn in a New Budget Application by 5:00 p.m. on Monday, January 23, 2017, **will disqualify the organization from receiving funding from the Student Government Association for the upcoming fiscal year. Organizations who do not comply with the deadlines provided WILL NOT qualify for an appeal.***

Funding Interviews

Interviews provide an opportunity for the Committee to visit with organizations in order to discuss the budget application in detail.

The Committee suggests that the president and the treasurer attend the interview, and would strongly recommend that the advisor be in attendance as well. Any other officers or members of the organization are welcome to attend. The Funding Interview will take approximately 15-30 minutes. Please bring a copy of your organization's New Budget Request as well as any other aids (budgets, posters, event plans, etc) with you for your own reference.

All funding interviews shall be open for public attendance. Questions will be asked to organization representatives by members of the Committee on Budget and Finance or Student Senate. Interviewers will have a list of standard questions, but are allowed to and frequently do ask follow-up questions that may not be scripted but still pertain to the budget process. Members of the media may attend funding interviews, but recordings (written or taped) will not be allowed. The Committee will not permit individuals and/or organizations to televise or broadcast by radio (either live or recorded, including film) from the SGA Conference Room while the funding interview is in session.

All organizations must submit their Funding Interview request via OrgSync by 5:00pm, January 23, 2017. Failure to do so will result in an automatic 20% penalty (at the discretion of the committee). **Any organization that does not submit their Funding Interview Request via OrgSync by 5:00 p.m., January 27, 2017 will be disqualified from receiving funding from the Student Government Association.** All organizations must attend their scheduled Funding Interviews. *Failure to attend a Funding Interview will result in an automatic 40% penalty from the Budget & Finance Committee's recommended allocation and **may disqualify an organization from consideration by the Committee on Budget and Finance for a funding allocation.***

*If you need to reschedule your interview after January 27, 2017, you must **CALL the SGA office AT LEAST 24 HOURS PRIOR TO YOUR SCHEDULED INTERVIEW TIME,** otherwise you will be considered a "No Show" to the interview and will be subject to the 40% penalty.* In the event that the interview time is missed for *valid reasons*, it is the responsibility of the organization to reschedule the interview time. If no time slots are available or if an organization fails to reschedule the interview time, the organization will receive an automatic 40% penalty from the Budget & Finance Committee's recommended allocation and may disqualify an organization from consideration by the Committee on Budget and Finance for a funding allocation.

<u>What to Expect During the Interview</u>
Questions will be asked to determine the organization's:
- Financial status
- Fundraising efforts
- How the organization has enhanced and brought recognition to Texas Tech
- Membership and growth
- Investment in the university (projects benefiting the university, involvement in campus activities)

Failure to attend the scheduled Funding Interview will require the organization to go through the appeals process and will result in an automatic <u>40% deduction </u>from the Budget & Finance Committee's recommended allocation

Important SGA Calculations that Effect Funding:

- The amount of the allocation cannot be doubled OR reduced by more than half the amount of the previous year's allocation.
- The amount of allocation cannot exceed 30% of the organization's total fundraising and external funding (combined).
- If organizations do not utilize the funds allocated from the previous three years, they could be penalized at the discretion of the Budget & Finance Committee.
  **NOTE: If any of these rules overlap, the Budget & Finance Committee will use their discretion to calculate the final allocation.

Penalties:
- A 20% penalty (or to the discretion of the committee) will be deducted from the allocation amount for failure to turn in the application on OrgSync by December 23, 2016. After Monday, January 23, 2017, no applications will be accepted and the organization will be disqualified from receiving funding from Student Government Association.
- A 40% penalty (or to the discretion of the committee) will be deducted from the allocation amount for failure to schedule and/or attend a funding interview by January 23, 2017. After Friday, January 27, 2017, no organizations may sign up for a funding interview and the organization will be disqualified from receiving funding from Student Government Association.

Student Organization Appropriations Bill

The Student Organization Appropriations Bill is the actual legislation which the Committee presents for the Student Senate's consideration concerning SGA funding for a specific fiscal year.

The Budget and Finance Committee will meet to determine allocations and author the Student Organization Appropriations Bill. The Committee will recommend approval of the Student Organization Appropriations Bill to the Student Senate. Senate meetings begin at 6:00 p.m. in *Room 353* of the *Media & Communications College* and are open for public attendance. The Student Organizations Appropriation Bill will be presented on three separate readings:
- First Reading on Thursday, February 23, 2017
- Second Reading on Thursday, March 2, 2017*
- Third Reading and Final Passage on Thursday, March 30, 2017*

*NOTE: The Senate will debate and amend the Student Organization Appropriations Bill only during Second Reading and Third Reading.

Once the Appropriation Bill is approved in the Senate, the Bill will be submitted to the Student Government Association President. The President's signature will indicate approval of the appropriation.

Appeals Process

If your organization does not appear on the Appropriations Bill that the Committee on Budget and Finance presents before the Student Senate, don't panic. **First of all, you should schedule and attend an Appeals Interview with members of the Budget and Finance Committee. If you do not attend this meeting, or do not feel that you have been allocated the correct amount, you should then contact a Senator from your college and contact the Chair or Vice-Chair of the Budget & Finance Committee.** Sometimes, it is a simple clerical error on the part of the Budget & Finance Committee that can be fixed before the bill is passed. Otherwise, it might be a reason to enter into the Appeals Process. The Appeals Process is a chance to have your questions answered face-to-face with the people present during the initial allocation. It is also an opportunity to state your case before a fresh set of committee members and with a different set of questions.

Reasons an organization would want to appeal:
- Did not appear on the Appropriations Bill
- Feels that they did not receive sufficient funds

To appeal, the organization should:
1. **Schedule an Appeals Interview** by going to the SGA office in room 302 of the SUB. Then attend the Appeals Interview with members of the Budget and Finance committee.

2. **If, after the amounts have been reallocated following appeals, the organization does not feel they have received sufficient funds, they should contact a Student Senator who is not a member of the Committee on Budget and Finance.** Typically, it is suggested that organizations wishing to appeal a decision of the Committee should contact a Student Senator representing its respective college. In addition, Senators-At-Large may be contacted by any organization. If you plan to appeal on the floor of the Senate, the Student Senate is not allowed to consider an appeal unless it is argued by a member of the Senate. You may be advised on who should represent your appeal by calling the Student Government Association Office at (806)742-3631.

3. *Plan a time to meet and discuss your case with the Senator.* When meeting with the senator, you should discuss the following:
   a. Why you did not appear on the bill
   b. Your history as a Funded/Registered Student Organization
   c. The amount that you are asking to be funded and why
   d. Other means your organization has of raising money
   e. Awards or recognitions bestowed upon your organization

4. *Attend a Mediation Hearing before the Budget & Finance Committee*. The organization must attend a mediation hearing with the committee in order to negotiate an allocation for the organization. At this hearing, the organization should expect from the Committee on Budget & Finance:
   a. To explain the reason they were left off the bill
   b. Discuss an appropriate allocation based on the reasons they were initially omitted from the bill and funding criteria
   c. Questions regarding their Budget Application and use of funds. The Budget & Finance Committee may vote to amend the Bill for an agreed amount.

5. ***A Student Senator may present your case to the entire Student Senate.***
   If the organization is still unhappy with the allocation after the results from the Mediation Hearing, their Senator may appeal to the entire Student Senate on their behalf. Once a Student Senator decides to present an organization's appeal to the Student Senate for consideration, the matter is in the jurisdiction of the Student Senate. The Student Senate at large shall be responsible for deciding and considering appeals that are presented by a Student Senator. It is important to note, a Student Senator is not obligated to present an appeal, although, the senator will likely present an organization's appeal if the appeal holds merit. It is also recommended that representatives from the student organization be in attendance at the Senate Meeting where their appeal will be made. The Student Senate has the final authority on all allocations. Organizations who are not included on the final bill are eligible for a limited amount of contingency funding, determined by the SGA President.

Notification of Allocation of Funds

Each budget application submitted via OrgSync will be updated with the allocated amount prior to the 1st Reading of the Appropriations Bill. Within (1) month after Final passage each budget application will be updated to reflect the final allocation. The status of the application will be changed to "approved". Should the Budget and Finance Committee decide to deny an application, the status will be "denied".

Any member of an organization who has access to the "Budget/Treasury" link will be able to view the application.

Funding Training

After an organization has received funding, Funding Workshops will be held in the fall semester to inform organizations of how to spend their allocation. It is required that at least two (2) officers of the organization be in attendance. Any new advisors are also *strongly encouraged* to attend. Attendance by the treasurer is highly recommended. These workshops are scheduled during the first few weeks of the fall semester. If the organization fails to attend one of the scheduled training sessions they will have to schedule a time to meet with the account manager for one-on-one training. **Organizations cannot begin utilizing their funding until this training is complete.** Organizations will be notified of dates and times for these workshops via OrgSync, TechAnnounce and the SGA website.

Uses and Limitations of SGA Funds
*As passed by Student Senate in SB 44.01 on September 4, 2008 **Amended on November 6, 2009*

Activities which may be funded include, but are not limited to:
1. Travel Expenses (hotel, transportation, meals, registration e.g.)
2. Speaker's fees & expenses (reimbursed to speaker only, cannot be reimbursed to the organization; we can pay for certain expenses ahead of time – airline, hotel)
3. General office supplies
4. Postage
5. Copying and printing (Copy of what was printed/copied required)
6. Event Room Rental
7. Organization Banners and Signs (including vinyl banners and organization displays) – Copy of the design required
8. Advertising (Tear sheet required)
9. Equipment Rentals
10. La Ventana Pages
11. Internal Publications (organization newsletter e.g.)
12. 50% of Recruiting Items (t-shirts, pens/pencils, mugs, koozies e.g.) – All recruitment items, including t-shirts, must solely be for the purpose of recruiting students to the organization; therefore, may only have the organization's name and/or logo. No other material, either expressly stated or implied, will be allowed on shirts paid for by SGA funds. (Request for Expense Approval Form and copy of the design required) Effective September 1, 2015, if SGA funding is being utilized for promotional/recruiting items then "Sponsored by Student Government Association" or SGA's official logo must be included at a reasonable size on the product. If it is not, then SGA will not provide funding for the expense.

Activities which CANNOT BE FUNDED include, but are not limited to:
1. Research Presentation/Poster or Paper Competition Travel or Advisor Travel Expenses
2. Scholarships, awards, gifts, or prizes
3. Fundraising projects solely beneficial to the organization
4. Operating expenses (telephone, subscriptions, salaries, copier rental, e.g.).
5. Fixtures, or furniture to decorate offices
6. Computers, printers, scanners, digital cameras, or hardware
7. Tents, tables, canopies, or camping equipment
8. Equipment of any kind
9. Club sports or any intramural expenses
10. Hotel room service/In room movies/DVD or VCR rentals/videos/tapes
11. Texas state sales tax
12. National or State Organizational Membership Dues
13. Donations of any kind
14. Publication subscriptions
15. Books, Handbooks, or Textbooks, including digital textbooks, unless authorized by SGA President (Request for Expense Approval Form Required)
16. Food, drink, decorations, or entertainment for banquets, receptions, meetings, buffets, parties, or other events.

Please Note: These lists are not all-inclusive. Other items may or may not be funded at the discretion of the Budget & Finance Committee and/or the President of SGA, and/or TTU

Accounts Payables. Graduate Organizations are now eligible for special funding through the Graduate Vice-President for an individual member's research presentation related expenses. Contact the SGA Office for more information. A link to the Individual Student Travel Application is located on the SGA website.

THE RIGHT STEPS TO TAKE

_____1. Update all information pertaining to your organization and officers on OrgSync.

_____2. Gather financial documentation and receipts necessary to complete the Funding Request Packet.

_____3. If desired attend a one-on-one preparation time with the Committee on Budget and Finance.

_____4. **Submit your New Budget Application by 5:00pm, December 23, 2016** Include:
- Submit the New Budget Application online at http://ttu.orgsync.com/
- One (1) electronically signed Funding Contract on OrgSync – making sure all three people named on the form electronically sign it
- Any additional information you deem necessary

****If for some reason your organization does not submit an application by the deadline, there will be a 20% penalty. After January 23, 2017, NO APPLICATIONS WILL BE ACCEPTED****

_____5. Sign up for a Funding Interview in OrgSync by 5:00pm, January 23, 2017.

****If for some reason your organization does not sign up for an interview by the deadline, there will be a 20% penalty. After January 27, 2017, NO ORGANIZATIONS MAY SIGN UP FOR AN INTERVIEW****

_____6. Promptly attend your Funding Interview. If you need to reschedule your interview, you must CALL the SGA office at (806)742-3631 at least 24 hours in advance of your interview time. DO NOT reschedule via email.

_____7. Attend (if you wish) the First, Second, and Third Reading & Final Passage of the Organization Funding Bill during the Senate meetings on the dates indicated.

_____8. Await notification of funding via OrgSync.