

Student Activities Council

U N I V E R S I T Y o f P E N N S Y L V A N I A

Budgeting and Allocations **funding standards/guidelines & priorities**

Memo from the SAC Chairman
January 30, 2003

Attention: All Treasurers / Financial Managers* of SAC recognized groups

* If you are not the designated treasurer to your group, please ensure that he/she receives this memo, since it contains important information pertaining to the annual budgeting and allocations process for next year. By attending this meeting, you are agreeing that the applicable person is/will be duly informed.

Budget Categories:

There are ten SAC budget categories. If you are not sure under which category your request falls, please contact your SAC Executive Liaison for assistance. The categories are as follows:

- 1 Advertising**
- 2 Communications**
- 3 Costumes**
- 4 Dues**
- 5 Equipment/Supplies**
- 6 Facilities/Security**
- 7 Honoraria/Services**
- 8 Photocopies/Publications**
- 9 Production**
- 10 Travel/Conference Fees**

Advertising

The Advertising category contains advertisements in any medium. This includes the other student group publications, radio spots, etc. SAC does NOT fund ads for the DP except in special situations. Be prepared to justify any requests that violate this rule. So that the University community will know what activities SAC is financially supporting, the words "SAC Funded" must appear at the bottom of all advertisements. Remember that you are encouraged to advertise in SAC publications. Check with the

publication editors for ad rates. If you are requesting funds for fliers and posters, please include that amount in the Photocopies/Publications category.

Communications

SAC will not fund phone service, internet connections, or PENNnet connections for any group except under special circumstances, regardless of office space. SAC will not fund mailings of any kind. These costs should be funded through revenue or dues. There is no need to request funds for Dolphin Accounts, as this expense is paid for by the Undergraduate Assembly for all SAC recognized groups.

Costumes

SAC will fund \$50 per year per member (for a maximum of 20 members) for Costumes for Performing Arts Dance groups. SAC will fund \$25 per year per member for Costumes for Performing Arts Non-Dance groups. Funding is higher for Dance groups due to the higher cost and number of costumes necessary for these groups.

Non-Performing Arts groups holding performances in theaters or facilities will receive ½ of any standard that a Performing Arts group receives.

Dues

Those groups that must pay dues to a national or international organization in order to exist should list those dues in this category. Please provide proof of both the amount of dues required and the minimum amount of students that must be paid for to verify the necessity of the dues. SAC will only fund the minimum dues necessary for that group to remain a chartered chapter of that national organization. Dues paid to umbrella organizations are not funded by SAC.

Equipment/Supplies

This category contains almost any physical thing which a group would purchase, rent, or repair over the course of the year. The following list gives some examples of items that are and are not in this category:

In this Category

Telephone Sets
Backhoe Rental
Lumber
Tubas
Repair of guitar
Furniture
Sponge rollers for applying stamps
Paper for photocopying
Blank computer disks
Purchase of pens, pencils, staples, etc.

Not in this Category

Telephone Line Charges
Car Rental for Travel
Wood-chopping
Professional Musicians
Piano Tuning
Facilities Rental
Postage stamps
Photocopying
Professional layout on design

Not all organizations have offices or require extensive supplies; therefore, groups requesting office supplies should be prepared to explain why such purchases are necessary to the operation of the

activity. All equipment purchases in excess of \$500 require three written price quotes. If you do not want to take the lowest bid, you must provide a written explanation of why you prefer the more expensive option. Even if a purchase is for less than \$500 be sure to shop around to get the lowest price. The University has a helpful website to assist you in finding suitable vendors for your needs. The site is at http://www.purchasing.upenn.edu/contracts/contract_list.asp.

Performing Arts groups, use this category to request supplies needed for your organizations everyday functioning (e.g. office supplies). Please use the Production category for all expenses related to each particular show (e.g. backstage costs). All capital equipment allotted to an activity must be stored in a University facility.

Funding Standards:

- \$75 for general office supplies.
- \$1,500 for all promotional items for each Support or Peer Education group
- No funding will be given for gifts (excluding of honoraria for speakers), or donated items such as housing or educational materials.

Facilities/Security

This category contains all charges that stem from the use of facilities, either on- or off- campus, and any security that must be contracted as part of the event. For non-performing arts groups, please contact all facilities you plan on using throughout the year and submit accurate foreseeable costs in your budget. All facilities must be requested in advance of the performance. SAC reserves the right to not fund a group based on inability to fill the theatre. SAC asks that all groups seek to use VPUL facilities, and those facilities will be given priority. Performing Arts groups do not need to request funds for facilities costs.

Honoraria/Services

This category covers all payments made for services as opposed to tangible goods with the following exceptions; security services are covered in Facilities/Security, and repair services are covered under Equipment/Supplies. However, piano tuning would be a service covered by this category. Gifts given to speakers are not covered in this category. Gifts are tangible items, and are therefore covered by Equipment/Supplies. If total speaker honoraria and expenses will not exceed \$100, please request funding at this time. No group will be funded for more than one speaker per month. SAC will fund all travel and accommodation fees associated with a SAC funded speaker. All speaker honoraria costs that exceed \$100 (including travel) must be brought to SPEC Connaissance. Co-sponsorship forms are available from Victoria Natri in the Office of Student Life (OSL).

No individual can be paid a salary or wage for services which can or should be rendered by a student. SAC is funding ½ of instruction / coaching for the groups that require it subject to a \$2,000 maximum. If a SAC-paid director or coach requests his/her salary before the normal end of semester pay date, he/she may be paid 20% of the total semester salary. The remaining 80% will be paid at the semester's end.

The Executive Committee will not fund speakers if the speaker is specific only to the group's members and couldn't be relevant to students outside the group.

Remember: No student or group advisor may sign a contract on behalf of a student organization or the University. All contracts must be processed through Victoria Natri (898-2753) in OSL.

Photocopies/Publications

This category contains all publication and xeroxing costs.

The Executive Committee encourages student groups to devote more resources to advertising via posters and fliers than purchasing ads in the Daily Pennsylvanian. This is a much more effective and cost efficient means of advertising. Publicity through flyers is included in the standard allocation. So that the University community will know what activities SAC is financially supporting, you must place the words "SAC Funded" on all flyers.

SAC requires that all publications groups raise 25% of their publication cost through outside revenue (e.g. advertising). 75% of printing cost will be listed as a grant — the other 25% will be given as a loan only. Your SAC grant cannot and will not be used to cover this 25%. Three quotes are required for all requests related to the creation of a publication.

Stationery is provided if it is essential to the groups purpose. Groups will be given funding for stationery only during annual allocations and only after they have been recognized for a full year. Groups will be given funding for stationary once and are encouraged to make photocopies of the letterhead for future use. The allocation (for organizations who have never had official stationery) for standard University bond letterhead from the Publications Office (basic-type without a logo) is \$130 for 500 sheets and envelopes.

Funding Standards:

- \$150 for photocopies for all groups.
- \$50 per semester for programs for Performing Arts groups
- \$2,750 less 25% (\$2063) per semester for publications and the funding of only one printing per semester.

The cost of printing tickets for all events should be covered in the price of the tickets. No funding will be given for newsletters.

Production (for use only by Performing Arts groups)

This category is for all expenses related to producing a show. This includes expenses such as script rights, set materials, and van rental for load-in and strike. Please use the Costume category for those expenses.

Performing Arts groups do not need to request funds for facilities costs.

Travel/Conference Fees

This category contains all expenditures relating to the attending of conferences, tournaments, or other events that have registration costs. It is the policy of SAC to pay for travel only in special circumstances, and in those circumstances, to only pay for 50% of the travel costs. The group traveling must pay for the other 50% of the travel costs. SAC policy is to fund travel only when that travel is essential to the purpose of an organization. Essential has been defined as:

1. Intrinsic to the purpose of an organization (e.g. Debate Council, Alternate Spring Break), or
2. Required to retain membership in a national or regional organization.

SAC does not fund international travel; this differs from national championships/tournaments that may be funded upon request and demonstration of appropriate need by the competitive group. Travel is limited to the East Coast and Pennsylvania unless necessary or for some national championship (Washington D.C. to Boston).

The minimum number of people required for travel will be funded. In this case, the lesser of one-half of all travel and lodging or \$250 per person for travel and lodging will be funded.

SAC will fund all travel and accommodation fees associated with a SAC funded speaker.

No funding will be given for SAC student group-run conferences

Travel for community service organizations is fully covered, but SAC has the right to reduce the number of people going or the frequency of trips.

No funding will be given for travel for non-community service groups performing community service.

Please keep in mind that travel fees will not be funded retroactively.

Registration costs are given as a full grant.

General

1. Duplication in activities will be eliminated; the better program in the Committee's judgment will be funded.
2. Meal subsidies and general refreshment for members of student activities will not be funded.
3. The Executive Committee may decide to reconsider a request denied to an organization if
 - a) Legitimate factors (e.g., number of members) have changed to make the original circumstances regarding the decision no longer valid, OR
 - b) The parties involved (e.g., SAC Representative, Executive Committee, Executive Liaison) feel strongly that an honest misunderstanding took place regarding the facts and figures of the particular case.
4. Any program that is considered campus wide and social shall be referred to SPEC.
5. If a program is being partially funded by the Social Planning and Events Committee, the Student Activities Council will not fund it.
6. No funding will be give retroactively.
7. Any budgets (excluding contingency requests) submitted after the allocation process has been completed in February/March of the spring semester will be subject to a 25% budget reduction.