

Trinity College Student Organization Finance Manual



**Trinity College
Student Government Association (SGA) Budget Committee and
Office of Student Leadership and Engagement (S.L.E.) Student
Organization Finance Manual**

Last updated Fall 2023

THE STUDENT ACTIVITIES FEE

The Student Activities Fee (SAF), which is collected by Trinity College within each undergraduate student's tuition and fees prior to the start of each semester, is set by the Student Government Association (SGA). This fee is used to fund co-curricular programming for students through recognized student organizations and SGA-supported initiatives. The SAF is controlled and allocated to all student organizations, initiatives and accounts by the SGA Budget Committee. The SAF for the 2022-2023 academic year is \$430.00 (\$215.00/semester).

It is the discretion of the SGA Budget Committee to allocate funds to petitioning student organizations. All student organizations are subject to the rules, regulations and penalties established by the SGA Budget Committee, as well as those stated in the Trinity College Student Handbook, and are supported by the Office of Student Leadership and Engagement (S.L.E.). 8

Purpose of the Student Activity Fee

The primary purpose of the SAF is to fund recognized student organizations at Trinity College with the goal of providing co-curricular programming for the student body. The SAF aims to be accountable for up to fifty percent (50%) of social life on campus for students through: Community Service & Civic Engagement organizations, cultural/identity organizations, informal sports (club and intramural) organizations, media organizations, arts/performance organizations, academic organizations and special interest organizations. In addition, the SAF will support campus-wide initiatives such as the UPASS program, Club/Intramural Sports, ConnPIRG, Event Support and the off-campus shuttle.

The SGA Budget Committee will be responsible for evaluating the policies and procedures of the SAF each year in order to ensure proper allocations and responsible funding. The Budget Committee will assess and develop a comprehensive strategic plan to implement acceptable policies and procedures for the management of the SAF that will be shared with the College community at the end of each academic year for the following year. Additionally, the Budget Committee will discuss possible topics for next year.

Accountability of the SAF is contingent upon a successful relationship between the SGA Budget Committee, the Office of Student Leadership and Engagement (S.L.E.), and the Trinity College Business Office. The SGA VP of Finance, the Assistant Director of Student Leadership and Engagement (S.L.E.), and the SGA Finance Secretary shall establish regular communication between these entities

BUDGET COMMITTEE

The Student Government Association (SGA) Budget Committee, which is a part of the overall SGA organization, is comprised of the VP of Finance, the SGA Finance Secretary, three (3) students within the SGA, four (4) student Senators elected at-large by the student body. At-large members of the Budget Committee shall serve a (2) consecutive semester term for their position; senators shall serve a one-year term. The committee sets policies and procedures for all recognized student organizations and handles the allocation of the Student Activities Fee (SAF). Specific information regarding the SAF, the Budget Committee, or student organizations can be obtained from the President of the SGA (SGAPresident@trincoll.edu), the VP of Finance (sgafinance@trincoll.edu), or the Assistant Director of Student Activities, Involvement & Leadership (Romulus Perez –romulus.perez@trincoll.edu)

SGA Constitution – As amended Spring 2020

ARTICLE VI: Section 2 - Budget Committee

A. The purpose of the Budget Committee shall be to:

- a. Meet weekly to discuss funding requests from students and student organizations, to discuss its course of action, and to gather input regarding the Committee's activities.
- b. Oversee the distribution of the Student Activities Fee (SAF) allocated to the SGA to fund SGA approved student organizations, trips, conferences, etc. as outlined by the Budget Committee bylaws.
- c. Guide students and student organizations through the budgeting process, such as requesting funds, creating proposals, funding appeals, and efficient budgeting.
- d. Ensure confidentiality among its membership regarding financial and allocation decisions.
- e. Collaborate with the Senate to ensure student interests are reflected in the SGA's financial matters.
- f. Be fiscally responsible in the distribution of the Student Activities Fee (SAF) allocated to the SGA.

B. The Budget Committee shall consist of:

- a. The VP of Finance
- b. The Finance Secretary
- c. At minimum four (4) SGA Senators
- d. At minimum three (3) student representatives from outside SGA

C. To remain on the Budget Committee, members must:

- a. Attend weekly Budget Committee meetings. Members can miss no more than three meetings per semester or probationary measures may be taken.

Line of Succession - In the event that the Vice President of Finance is removed, cannot continue to adequately serve, or an emergency has prevented them from serving, the Finance Secretary will become the interim Vice President of Finance. Thereafter, the Committee as a whole will vote on a new Finance Secretary. In the event that neither the Vice President of Finance or the Finance Secretary are either unable to, or deemed fit to serve, then the committee shall vote to appoint both interim positions. A two-thirds quorum of members is required for any vote to be deemed legitimate, and a simple majority is required to appoint any new member. Any person who wishes to be voted to hold the interim Vice President of Finance role must have at least one year of Budget Committee experience.

STUDENT ACTIVITIES FEE FUNDING

Section 1 - Student Organization Eligibility

Recognition & Registration:

Only those student organizations, which are recognized by the Office of Student Leadership and Engagement (S.L.E.) and the Student Government Association (SGA), will be eligible for funding from the SAF. Status of recognition will be established in accordance with the policies outlined in the Student Handbook (see section on Regulations and Procedures Affecting Undergraduate Student Organizations).

Fall Semester: Student organizations must re-register via the Registration Form located on the organization's BantamLink page and complete the required training with S.L.E./SGA by October 1st in order to maintain access of their budget for the fall semester. Re-registration will be made available starting the first few weeks of August. Community Service & Civic Engagement, as well as Club Sports, will be manually registered and trained by the respective staff.

Spring Semester: For new organizations, they must complete all information for new organizations.

Student organizations must register their President, Vice President, Treasurer, and Advisor for the next academic year with S.L.E. by the last day of final exams in order to be allocated a budget for the following school year and for correspondence over the summer. Organizations must submit a general membership roster with their re-registration form in the fall semester.

Section 2 - Budget Allocations

PART 1 – Student Organization Categories

The Budget Committee will allocate funds to all student organizations recognized by the SGA. Organizations will be placed into the following 3 categories:

NEW STUDENT ORGANIZATIONS – These are newly formed student organizations that have been recognized by the end of March of the previous academic year. These organizations will only be eligible for up to a \$250.00 Annual Operating Budget a full academic semester (13 weeks on the academic calendar) since the date of submitting all necessary documents to the Student Oversight Committee. Once SGA approved and after the 13-week period, clubs can request up to \$1000 for the next academic year.

During the SGA approval period, new organizations cannot receive funds from the SAF. If during the 13-week period, an organization becomes SGA approved, it may not receive funds from Budget Committee prematurely, but it is permissible to be sponsored by other organizations.

SGA-RECOGNIZED & FUNDED ORGANIZATIONS – These are existing and currently active student organizations, which the Budget Committee has identified as an organization requiring budgets for year-round operations. These organizations will be allocated an annual operating budget determined by the Budget Committee each year. These organizations may only be eligible to request additional funds in case of funding shortfalls and will be dependent upon funds left in the SAF. Request(s) for additional funds will be heard on a case-by-case basis with the Budget Committee. All student organizations NOT listed under the approved **SGA-Recognized & Funded Organization** list will be categorized as an **SGA-Recognized & Not Funded Organization**.

The Budget Committee will hear requests for and vote upon the SGA-Recognized and Funded Organizations for the upcoming year during end of year reviews each spring semester. Student organizations will be notified of their budget allocations by the last day of final exams during the spring semester.

SGA-RECOGNIZED & NOT FUNDED – These are existing and active student organizations which the Budget Committee has identified as an organization NOT requiring an annual operating budget. Each of these organizations will not receive an annual operating budget. However, if this organization is recognized by S.L.E. and SGA, then this organization may request funds from Budget Committee.

PART 2 – ALLOCATION OF BUDGETS:

Annual Operating Budgets

These budgets are allocated to all **SGA-Recognized & Funded Organizations**. Each of these organizations will be allocated an operating budget for the academic year dependent upon needs of organization and previous financial history. **Only SGA-Recognized & Funded Organizations will be allowed to request event and expenditure funds from the Budget Committee on an as-needed basis (refer to Section 3).**

Annual Operating Budgets may be used for any expenses, with the following exceptions: ● Up to \$250.00 only may be used to purchase food for meetings. This is the only amount that may be used on food and no additional funds will be allocated to cover the cost of food for meetings.

- ALL Event Support, Campus Safety and additional security or event management charges will be funded by the SGA through the Event Support account, as deemed appropriate. Organizations may not use their Annual Operating Budgets for these expenses.
- Alcohol may only be purchased for *campus wide* programs by **SGA-Recognized & Funded Organizations**, but must abide by the Social Events with Alcohol (SEA) policy. Alcohol is not permitted for membership socials or dinners.

Event & Expenditure Allocations

These allocations have been granted by the Budget Committee to active **SGA-Recognized & Funded Organizations** following the process detailed in Part 3. Allocations of this type are to be used **ONLY** for the indicated expenses as listed in the Budget Committee Request Form. Remaining unused funds from allocation should be transferred back to the Budget Committee.

PART 3 – Deadlines & Process for Requesting Event & Expenditure Proposals

The SGA Budget Committee allocates Event and Expenditure funds to active **SGA-Recognized & Funded Organization** only. These organizations may request funds for events or organization expenditures related to conference attendance, travel, etc. **There is not a limit on the number of proposals that may be submitted within the school year and funds will be allocated on a first come, first served basis.** Examples of events and expenditures include: social events with or without alcohol, = and workshops, speakers, entertainment (bands, DJ's comedians), tournaments, etc. The process for applying for funds is listed below.

Deadlines for Submitting Event and Expenditure proposals

Summer No budget allocations will be awarded after the last Budget Committee meeting of the spring semester.

Fall All allocation requests for the fall semester must be submitted prior to the last week in November. The last two weeks of the fall semester are to be used for Mid-Year Reviews of organization accounts.

Spring All allocation requests for the spring semester and summer must be submitted prior to the third week in April. The last two weeks of the spring semester are to be used for End-of-Year Reviews of organization accounts.

Procedures for Submitting Event & Expenditure Funds proposals

1. The first step in planning for an event or expenditure is to submit an Event Request Form through BantamLink. This form will be sent automatically to the S.L.E. Office for approval and to reserve your event location in the College's booking system, EMS. Budget Committee Event and Expenditure requests will not be reviewed unless the organization's Event Request Form has been approved and the event location has been reserved.
2. Organizations should create a cover letter that gives a summary of the event or expenditure (include dates, times, location, etc.), the organization's name and contact information, and complete the Budget Committee Request form. These must be submitted a minimum of 2-4 weeks in advance of the event or expenditure to the Budget Committee by emailing the completed documents to sgafinance@trincoll.edu. **Between two and four weeks minimum are required—no exceptions will be made. Requests submitted after the deadline will be automatically denied. Only four proposals may be submitted within a four-week period.**
3. The SGA Finance Secretary will provide formal notification of the final approved amount will be sent to the organization contact within 48 hours of the hearing.
4. Funds approved by the Budget Committee will be allocated to the organization's account the week after the Budget Committee meeting where the proposal was voted upon. These allocation deposits will be managed by the S.L.E. Office to ensure that the funds are spent on the approved expenses and any funds not spent will remain in the organization's account. **Please Refer to Section 9 - Budget Policies Governing Expenditures before preparing Budget Committee Request Form(s) for spending limits and non-approved expenditures.**

Section 3 - Criteria used for Allocating Event & Expenditure Funds

The Budget Committee, in determining the allocations of Event & Expenditure funds, will use the following as criteria:

- Top priority for allocating funds will be given to campus wide programs and initiatives
- Benefits of the event or expenditure for the Trinity community
- Number of students whom it will benefit
- Availability of the funds from the Budget Committee
- Degree to which the organization abided by the guidelines established by the Budget Committee
- Historical fiscal responsibility of the organization
- Organizations who work together and co-sponsor with other student organizations or departments

Section 4 - Mid-Year/End-of-Year Budget Reviews

All organizations funded through the SAF will be subject to a Mid-Year and an End-of-Year Budget Review. These mandatory reviews will be conducted for all **SGA-Recognized & Funded Organizations**.

The SGA Finance Secretary will place budgets for the organization(s) in question on hold and an invitation will be sent to the appropriate organization(s). If an organization in question is planning on utilizing their funds during the spring semester and not the fall, they must submit that plan in writing to the SGA VP of Finance by the first day of Trinity Days and will not be required to attend a Mid-Year Review. If by the first day of the spring semester of the same academic year the organization in question has not contacted the SGA Finance Chair about the hold on their budget, all funds will be returned to the Budget Committee.

If after the initial hold is placed on a student organization's budget and their original operating budget is returned to the Budget Committee, the organization President has not contacted the SGA Finance Chair by April 1st of the same academic year, the organization will be considered inactive and will be placed on suspension for the following academic year. An ad hoc committee comprised of the SGA Finance Chair, SGA Finance Secretary, Budget Committee and SGA Executive Board will hear the petitions for re-activation the following fall semester. Organizations will remain on probation and inactive status for the entire academic year. This committee will hold a hearing with the leaders of the organization in question. All decisions will be made by a simple majority vote of the committee. Appeals will be accepted starting the first day of classes of the following academic school year and appeals should be sent to the newly elected SGA President and SGA Finance Chair.

Section 5 - Expenditures Policies

All student organizations funded through the SAF are expected to adhere to the following policies:

- All budgetary practices are subject to review by the Budget Committee.
- Financial paperwork in excess of the balance of an organization's account shall be deducted from future requests or the organization's operating budget for next year.
- If an organization overspends their budget, the amount by which they overspent will be immediately deducted from the organization's Annual Operating or Year-Round budget for the following year.
- Donation of operating budget or Budget Committee funds to any off-campus organization/individual is expressly forbidden.
- All funds, which are not spent by the end of the academic year, will revert back to the SAF. • All equipment bought with the SAF is the property of Trinity College and the Student Government Association (SGA). In accordance, it must be on file with the SGA and S.L.E. Office and must be stored in the organizational storage area overseen by the S.L.E. Office.

All students at Trinity College should be able to participate in the basic functions of an organization regardless of their financial situation. The basic functions of an organization are those functions that are defined in the organization's constitution, as being essential to the existence and purpose of the organization. Those members of the organization who feel as though they are being required to spend more than they can personally afford may file anonymous complaints with the Budget Committee. The Budget Committee will decide if any form of financial discipline needs be enacted upon the organization. Only organizations that are brought up on charges may be evaluated in regard to this policy. The Budget Committee will not compromise its current policies to satisfy this complaint. The SGA Budget Committee reserves the right to act upon complaints at its discretion.

All revenue must be reported to the Office of Student Leadership and Engagement (S.L.E.).

The creation of non-Trinity College accounts for organizations that are funded by the SAF are illegal and prohibited. Creation of such accounts will result in immediate action by the SGA President, VP of Finance, and the Director of S.L.E.

Section 6 - Budget Accountability

All student organizations are responsible for maintaining accurate and detailed records for their budgets. This includes abiding by all policies and procedures set forth in this manual and the Trinity College Student Handbook. The mismanagement or overspending of budgets is unacceptable. Any overspending of budgets or event and expenditure funds must be paid back to the SAF and will be handled in the following manner:

- Any overspending under 15% of the actual allocated amount of the Event & Expenditure Funds will be reimbursed by the organization's Annual Operating Budget. If the amount left in the budget is insufficient to cover the overspent amount, the organization will be ineligible for any Event & Expenditure funding until the

amount has been repaid by the organization(s) to the SAF, or the overspent amount will be taken out of their annual operating budget for the next academic year.

- If an organization over spends their Event & Expenditure Funds by 15% or more above the actual allocated amount, the organization will be ineligible for an Annual Operating Budget or Event & Expenditure funding for one semester. After one semester, they will be eligible to request Event & Expenditure funding from the SGA Budget Committee. Starting the following academic year, the organization will be eligible for an Annual Operating Budget, after the Budget Committee votes on their eligibility.

Section 7 - Budget Policies Governing Approved Expenditures

ALCOHOL - The Budget Committee will only approve funding for alcohol (beer & wine only) for events that are open to the entire College community. Alcohol for meetings, dinners or organizational socials will not be honored. The Budget Committee will only approve funding for alcohol that will be served on-campus through the Trinity College Dining Services catering department. Please note that hard liquor is NOT allowed at any Trinity College student event.

APPAREL/UNIFORMS - RESOLUTION: *As amended on 03-29-2016*

1. The SGA Budget Committee will not allocate funding for apparel which will be sold to raise money for charity, as it is an indirect violation of the SGA Mandate which states the SGA funds cannot be used for charitable contributions.
2. The Budget Committee will consider requests for apparel under two classifications: essential and nonessential apparel.
 1. For essential clothing, the Budget Committee will fund up to 100% of apparel cost which is reusable, and up to 50% for apparel which is not reusable. Essential clothing must be proven to be absolutely necessary to the fulfillment of the petitioning organization's mission.
 2. For non-essential clothing, the Budget Committee will fund up to 25%-50% of the apparel cost, based on their discretion.
3. Any deviations from these guidelines must be passed by a unanimous vote of the Budget Committee. 4. All final allocations are at the discretion of the Budget Committee, and it is the responsibility of the Finance Secretary to explain the reasoning of apparel funding decisions to petitioners.

ALTERNATIVE BREAK TRIPS/SPRING BREAK TRIPS/CONFERENCE POLICY - A ceiling of 15% of the Annual Budget Committee funds will be set aside for alternative break trips, spring break trips, and conferences. Budget Committee will match fundraising (if possible). Fundraising is defined as money raised from other sources other than individual contributions. No one organization may get more than half of the available funds. If the trip consists of less than 5 people, students cannot request funds that exceed the SAF per person.

A/V/ CAMPUS SAFETY/ SECURITY / EVENT MANAGEMENT CHARGES – These charges will be funded through the SAF Event Support account. Organizations should make these requests as part of their Event & Expenditure Fund Proposals. Organizations who utilize their Annual Operating Budget will not be reimbursed for these costs.

AWARDS & GIFTS – Will not be honored by the Budget Committee, nor will Trinity student employee wages. Any awards/gifts presented to a Trinity College student, staff, faculty member or non-Trinity College affiliate must be paid for through fundraised revenue by the student organization.

CONFERENCES & MAJOR TRIPS

- **RESOLUTION: *As amended on 03-29-2016***

- The SGA Budget Committee will allocate up to \$15 per person per day for conference trips of up to two overnight stays.

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- The Budget Committee will detract the value of any food provided by the conference or trip venue from the \$15 per person per day up to \$5 per meal.
- **RESOLUTION: *As amended on 03-29-2016***
 - The SGA Budget Committee will allocate up to the full estimated value of an off-campus conference once per academic year per student.
 - Any further Conference requests by an individual student will only be funded up to the value of conference registration.
 - Final allocation amounts are at the discretion of the Budget Committee and must be thoroughly explained by the Finance Secretary to the petitioner upon the time of allocation.

END of YEAR DINNERS/BANQUETS - These requests will be considered on an individual basis and availability of funds.

EQUIPMENT - Requests for funds to purchase equipment should be necessity-driven. Only broken and essential non-existing equipment will be considered for funding. Any equipment purchased with college funds is the property of Trinity College. All equipment purchased by an organization with college funds must be reported immediately upon purchase to the Student Government Association (SGA) and the Office of Student Leadership and Engagement (S.L.E.) to be filed for inventory purposes in the organization's file.

FOOD for MEETINGS *as amended 4/2021* - Organizations may spend up to \$250.00 out of their standard operating budgets per academic year for food for organizational related meetings.

- The Budget Committee will not fund food, conference or otherwise, that is to be used for the sole purpose of group bonding.
- The SGA Budget Committee will allocate up to \$15 per student and speaker in the event that an organization is hosting a meal with a guest speaker, in an event which is open to the entire campus.
- In general, SAF funds may *not* be used to purchase gift cards/discount codes from any food delivery service app, restaurant, and/or catering service when grab-and-go food options are available. In the instance where club member/event attendee is off-campus or unable to attend the grab-and-go pick-up due to extenuating circumstances (quarantine, isolation, sickness, etc.), organizations may purchase gift cards for those members following these guidelines:
 - Organizations should opt to use grab-and-go options whenever possible. This is most aligned with the purpose of food as outlined in the Finance Manual, as well as Trinity Guidelines of purchases made with SAF-funds. If it is necessary for a student attending an event/meeting to receive a gift card due to extenuating circumstances, the organization is permitted to purchase gift cards for that student(s) with their operating budget, so long as the gift card does not exceed the cost of the individual packaged meal that is being offered.
 - Following the event, the organization must send an email to the Budget Committee (sgafinance@trincoll.edu) including the number of gift cards purchased and their amounts, the gift card number, and a general description of who the gift card was utilized by.

Example email to the Budget Committee:

Total gift cards purchased: 7 at \$12 each

Off-campus students: 3

XXXX-XXXX-XXXX

XXXX-XXXX-XXXX
XXXX-XXXX-XXXX

Students in quarantine/isolation: 4

XXXX-XXXX-XXXX

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XXXX-XXXX-XXXX

XXXX-XXXX-XXXX

XXXX-XXXX-XXXX

- If an organization fails to report their gift card purchases to the Budget Committee within 48 hours of the event, gift card purchasing privileges may be revoked and/or reevaluated for that specific organization.
- Any organization who utilizes SAF funds to purchase gift cards in lieu of food will be subject to a spot audit during mid-year and end-year reviews. To do this, the Budget Committee will randomly select organizations to review purchases from an event that utilized gift cards. If suspicious purchases are detected, the organization may be subject to further auditing and questioning by the Budget Committee.

Reimbursements: The Budget Committee recognizes that some gift cards may be bought on short notice without the opportunity to work with S.L.E. in advance to put the organization's operating budget toward the purchase. In the case that gift cards must be purchased last minute, organizations can submit a reimbursement form (found on BantamLink) to S.L.E. for a refund.

FUNDRAISERS – The Budget Committee will no longer pay for fundraisers for any student organization. Student organizations seeking to sponsor fundraisers may only use up to the maximum of their total Annual Operating Budget. If the organization is looking to plan a special or social event that would be generating revenue, the Budget Committee will consider allocating funds for the event, provided that it is not strictly a fundraising event and provides some benefit to the Trinity Community. Guidelines for fundraiser are listed below:

- *Organizations are permitted to donate funds that they raised through fundraisers, but the funds raised **cannot** originate from the SAF*
- *Funds from the SAF can be used to purchase supplies to assist in running the fundraiser*
- *Goods and services that can be immediately resold cannot originate from the SAF*
 - *Merchandise (stickers, popsockets, etc.) and apparel purchased using SAF funds **cannot** be sold or exchanged for revenue*

Example: An organization wants to host a bake sale to donate to the ASPCA. Funds from the SAF may be used to purchase baking ingredients, however they cannot be used to purchase store-bought baked goods that will be resold. However, the club is permitted to sell the baked goods they made themselves. Purchasers of the goods must use their own money, and not funds derived from the SAF.

Each year various student organizations launch efforts to raise money for their projects or activities. These efforts have been the responsibility of the organization and will continue to be. Some of these efforts result in gifts to the College and, if so, we need to ensure that the donors are properly thanked and their gifts officially recorded. To ensure that we are consistent in dealing with alumni, parents, and friends of the College, we are establishing rules for conducting student fundraising projects and for dealing with contributions from donors.

Most student-generated fundraising activities involve an exchange of goods or services for a contribution, and therefore do not fall under the category of a contribution to the College. In the event that the fundraising effort is

deemed a gift to the College, the organization's delegate who is responsible for monitoring the fundraising will receive instructions for dealing with gifts and interacting with the Development Office to ensure that proper receipts and acknowledgments are sent.

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What is a gift to Trinity?

A gift is made to Trinity College when a donor gives cash, check, credit card charge or tangible property for use by the College and the donor receives no property or consideration in exchange for the gift. The gift must be used to further the mission of the College. Supporting student activities supports the mission of the College.

Examples of gifts:

1. A donor writes a check to the Trustees of Trinity College to support the travel costs of the ski club. 2. A donor provides meals for the Trinitones when they provide their services voluntarily (no payment) in relation to a College event. The donor would need to ask for a gift receipt from Trinity and to submit the receipts for the meals.

Special cases:

1. A donor makes a credit card gift at a particular level to WRTC-FM and receives a T-shirt as a "premium." The gift to Trinity is equal to the amount of the credit card charge minus the value of the T-shirt. For example, if a \$25 gift to WRTC-FM means the donor gets a T-shirt and if the donor receives the T-shirt, then the \$25 gift is actually only \$22 if the T-shirt's value is \$3. If the donor declines the premium (the T-shirt), then the gift's value is \$25.

2. A person agrees to pay \$12 an hour for a student to do yard work for four hours with the understanding that the money received will support the efforts of Trinity's Habitat for Humanity student group. The money is not a gift because there is a quid pro quo. This means that there is an agreement: You do this and I'll do that. You give me this amount of money and I'll do this yard work.

MEMBERSHIP SOCIALS – Annual Operating Budgets may be used for membership socials. No additional funds will be allocated for these types of programs.

STAPLE EVENT STATUS – RESOLUTION: *As amended on 3-29-2016*

Bearing in mind that student events costing over \$10,000 constitute a significant portion of the Budget Committee operating budget each semester, and that the Budget Committee has encouraged large events to petition directly to the Budget Committee for event funding, rather than allocate such large amounts in annual budgets.

Observing that most organizations hosting these events hold them on a yearly basis and begin planning expenses for the event in the months or semester prior to the event.

Believing that proactive planning and spending will decrease costs for the organizations, ensure the continuity of events considered "staple events", and help the Budget Committee plan its spending for other initiatives throughout the semester.

THEREFORE, BE IT ENACTED BY THE SGA BUDGET COMMITTEE THAT ANY ORGANIZATION HOSTING AN EVENT COSTING OVER \$5,000 MAY APPLY FOR THAT EVENT TO BE GIVEN "STAPLE EVENT" STATUS BY THE BUDGET. ONCE AN EVENT HAS BEEN GIVEN STAPLE EVENT STATUS, THE

HOSTING ORGANIZATION MAY PETITION FOR EVENT FUNDS TO BE ALLOCATED IN THE ANNUAL BUDGET AND ADOPT RESTRICTIONS ON DISCRETIONARY REQUESTS ASSOCIATED WITH THE STATUS.

For an event to be given staple event status, it must:

1. Have occurred for 5 consecutive years. Petitioning organizations must present all budgets and attendance records for the previous 5 years of the event upon applying for Staple Event Status.
2. The Hosting Organization must give a full budget breakdown of the event at their end of year review, which can be equal to or less than the most recent Budget Committee allocation towards the event.

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3. Hosting Organization must give a review of all spending on the event and attendance after the event has occurred.
4. Organizations that fail to do this will not be able to receive funding for the event in their next annual budget.

Keeping in mind that organizations with Staple Events will see an inflation in annual budgets, restrictions associated with Staple Event Status include:

1. Any organization will be allowed one Staple Event
2. The Committee will allocate up to and not exceeding \$12,500 towards a Staple Event.
3. Staple Event funding cannot be used for any other club initiatives prior to the post-event review.
4. Organizations must include a method of keeping exact attendance at their events, in the form of ticket sales, registration lists, headcounts by S.L.E. officials, etc. The Committee will expect that organizations will adjust their Staple Event Budgets accordingly with any change in attendance.
5. Organizations will only be able to petition the Budget Committee for 25% of their annual budget over the course of the academic year.
6. Organizations are expected to not petition the Budget Committee for additional funds towards their Staple Event.
7. Deviations from these conditions must be proven by the Hosting Organization to be essential for the performance of its mission and must pass through the Budget Committee by unanimous vote.

TELEPHONES - Organizations who have office telephones will be responsible for paying for these costs through their Annual Operating & Year-Round Budgets. The Budget Committee will honor no additional requests for phones or phone lines.

TRANSPORTATION - Requests for travel utilizing a personal vehicle will only be eligible for reimbursement of gas, parking, and tolls. Organizations are highly encouraged to utilize school vehicles through Building & Grounds or to rent a vehicle through a third-party vendor. For third-party services such as Uber, Lyft, etc., the organization will be reimbursed for the trip's gas expenses (with receipt) at the current set mileage rate up to 170 miles per BantamLink event. Trips will only be reimbursed if they are pre-registered on BantamLink and pre-approved by S.L.E. and Budget Committee. Outstanding expenses (such as services fees, tips, taxes, tips, damages, etc.) beyond the deducted mileage cost will not be covered. Cars reserved through B & G will be billed to the organization's account at the currently set mileage rate, which is subject to change.

Section 8 - In Case of Emergency

Creation of an Emergency Fund - In the event the College declares an emergency and there arises a need for an emergency fund, the Budget Committee in collaboration with S.L.E. and the college's Vice President of Finance, will create an emergency fund for student needs. The fund will consist of donations from both the College, and from voluntary donations that campus organizations make. In the case that students are sent home for a set period of time,

the Budget Committee recommends that any club / organization events that are being held in that time have their funds reallocated to the emergency fund. The emergency fund will support and fund student needs on a case-by-case basis during the emergency.

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GLOSSARY OF TERMS

All student organizations funded by the Student Activities Fee (SAF) are subject to the guidelines and policies of the SGA Budget Committee and the Office of Student Leadership and Engagement (S.L.E.) as outlined in this manual. Please note that Trinity College business and purchasing guidelines and policies are to be followed by all student organizations as well.

Active Student Organizations

These are existing student organizations which the S.L.E. Office has identified to the Budget Committee as fully functional for the current academic year by fulfilling the registration and training requirements. This organization is entitled to the financial privileges awarded to active organizations including that they may require an annual operating budget and may request additional event and expenditure funds on an as-needed basis. Those organizations provided an **Annual Operating Budget** by the SGA Budget Committee will be allocated a specific amount for the academic year.

Coaches or Instructor Agreement

For payment for coaches at athletic events, all contracts and forms should go through Kevin Johnson, Director of Recreation. All items must be filled out and signed by the appropriate parties to ensure payment for the coach or instructor. **Kevin Johnson**, *Director of Recreation & Quest*– kevin.johnson@trincoll.edu

CT Income Tax Forms for Withholding Entertainers

Any Speaker, Performer or Entertainer whose total payment exceeds than \$1,001.00 is subject to a 6.99% Tax Withholding from the State of Connecticut. This policy is included in the performance contract to the entertainer and is the responsibility of the signing agent/artist to ask for this tax to be waived from the total amount being paid to the performer. If the sponsoring organization chooses to accept the waiver, the cost of the 6.99% tax must be covered by the sponsoring organization. **More information about the 6.99% Entertainment Tax is available from the Trinity College Business Office – Trinity Commons Rm. 214 (860) 297-2030.**

Event and Expenditure Funding/Budget Committee Request Form

Event and expenditure funding is allocated to recognized and active student organizations only. These organizations may be given yearly allocations by the SGA Budget Committee and/or may request additional funding for extra events or expenditures. **There is not a limit on the number of proposals that may be submitted within the school year and funds will be allocated on a first come, first served basis.** Examples of events and expenditures include: social events with and without alcohol, conferences and workshops, speakers, entertainment (bands, dj's comedians), tournaments, etc. Student organizations can submit these proposals through the Bantamlink.

Event Request Forms via BantamLink

This form is used by active student organizations to request event/meeting space from the College and for approval of events to occur through the S.L.E. Office. These forms are used to reserve on/off campus spaces for the organization and

must be submitted a minimum of 5-10 business days in advance of the event via BantamLink - <https://bantamlink.trincoll.edu/>. For large events, events with support services (catering, A/V tech, contracts, setups), travel trips, conferences, etc.), proposals will not be accepted less than 5-10 business days in advance due to the additional planning procedures that go into these types of events. Proposals submitted after the deadlines stated here will be automatically denied and asked to resubmit for a later date. **This form is only available on BantamLink through an organization's page. S.L.E. will review all requests before**

Financial Request Form

This form is used by all SGA/Trinity College funded student organizations to process all financial transactions. This includes requests for transfer of funds or expenses, reimbursement of expenses, payment of invoice/bills, contracts/speaker agreements and all deposits to a student organization account. The form must be filled out completely with the appropriate account numbers and signatures, along with original detailed receipts, invoices/bills, contracts, checks and money to be deposited. **Incomplete forms with missing information and/or invalid documentation will be sent back to the designated organization for resubmission. NOTE: Only the President or Treasurer of an**

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organization may sign off on these forms. Copies of this form are available in the S.L.E. Office – Mather Hall Room 107.

Fundraising for a Student Group or Activity

A fundraising event does not include receiving sponsorship from another organization. The goal of all fundraisers should be to either donate to an external cause (must be valid and in good-standing) or to help subsidize an organization's budget. All organizations wishing to organize a fundraiser must submit their event request through Bantamlink for approval. Guidelines governing the spending of budget funds on fundraisers are listed under Section 7 of this document.

Annual Operating Budget

This is provided to new/existing active student organizations which the Budget Committee has identified as an organization requiring budgets for year-round operations. These organizations will be allocated a yearly operating budget determined by the Budget Committee each year. Organizations' budgets may change from year to year as determined by the Budget Committee. Organizations provided annual operating budgets and event-specific funding have designated Trinity College business accounts that are accessible via the organization's BantamLink account. All financial matters (deposits, budget transfers, contracting, check requests, fundraisers, petty cash requests, etc.) **MUST** go through the S.L.E. Office for approval before being processed. Student organizations that frequently misuse their organization's finances (purchasing restricted items, disregarding proper procedures, etc.) will have their financial accounts frozen until such a time as the SGA Budget Committee and S.L.E. Office deem necessary.

Inactive Student Organizations

If an organization has not been reactivated by October 1st of the academic year they will receive an email from the S.L.E. Office and the VP of Finance, which indicates that they have 1 week from that date to clarify the status of their organization. If the organization do not reply to the email by the deadline, they will become inactive and lose access to their funds. The money will be reallocated to Budget Committee's account to be utilized as deemed appropriate by the Budget Committee. Organizations that have failed to meet the criteria contained in this manual or the Trinity College Student Handbook will be deemed inactive for a period of time until they complete the Student Organization Registration Form and fulfill the Student Organization Leadership Training requirement.

BantamLink Involvement Site for Student Organizations

Trinity College has contracted with Campus Labs to provide an interactive involvement site (BantamLink) for all student organizations, as well as for the general Trinity College community. Students interested in joining a student organization can browse the site to gather more information about a specific organization and view a calendar of upcoming events. Currently involved students can keep records of their co-curricular involvement during their time at Trinity College and

stay up-to-date on events, programs, and happenings within their own organizations. Student organization leaders can track their organization membership, financial transactions, events, conduct elections, and even communicate with members. Active organizations can submit requests via BantamLink for space, use of the S.L.E. corporate credit card, cash boxes, and petty cash, when applicable. BantamLink can be accessed at the following link: <https://bantamlink.trincoll.edu/>.

New Student Organizations

These are newly formed student organizations, which have been recognized within the current academic year. These organizations will be approved by the SGA and may or may not receive a general operating budget during their first year. Inquiries to start new organizations should be directed to the following staff depending on description for further information on how to propose new organizations for approval:

- Greek Letter Organizations: Emily Walker, *Assistant Director of Greek Life*
- Community Service & Civic Engagement: Joe Barber, *Director of Community Service & Civic Engagement* ●
- Club/Intramural Sport: Kevin Johnson, *Director of Recreation & Quest*
- Religious: Marcus Halley, *College Chaplain and Dean of Spiritual and Religious Life*
- Academic, Cultural/Identity, Media, Special Interest & Others - Romulus Perez, *Director of Student Leadership, Engagement, and Greek Life*

Performance Agreement Contracts

This contract is used for speakers, DJ's, bands, performers, workshops, etc. and will be drafted and processed through the Director or an Assistant Director of S.L.E. on the organization's behalf only for approved events. **Only a S.L.E.**

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professional staff member can draft and send a contract for the organization. The contract includes information for the performer, details of the event, such as time of performance, price, any special riders or equipment needed, rain dates and cancellation information. A W-9 tax form must be submitted with all contracts in order to process payment. Contracts MUST be submitted no later than two (2) weeks prior to the proposed event date for processing in order to ensure proper time for processing. Contracts submitted after a performance/event date may not be approved.

Purchase Order Forms

These forms are used when purchasing items to confirm prices, quantity, shipping address, and billing address. They can also be used to order an item and have it billed at a later date instead of paying up front. **Copies of the Purchase Order Form are available in S.L.E. - Mather Hall Room 107 – from Julie Graves.**

Request for Transfer of Funds

This is when an organization requests a transfer of funds from their account to another student organization and/or a department for co-sponsorship, expenses incurred from a program or materials or supplies for the organization. Documentation for transfer of funds or expenses will be required to support the request (ex: emails, written verification, etc.). **The Financial Request Form should be used for these types of transactions, which is available in the S.L.E. office – Mather Hall Room 107.**

Revenue

Any funds collected by an approved organization through a means other than the SAF (this includes Membership Dues, Social Event Fees, Fundraising, etc.). These funds should be deposited to the S.L.E. Office, which will deposit and record these funds to the organization's account. **ALL revenue must be reported to S.L.E. in order to verify rollover funding at the end of each academic year. Outside financial accounts are prohibited. The Financial Request Form should be used for these transactions.**

SGA Executive Board

The SGA Executive Board is comprised of the President, Vice President, VP of Finance, VP of Communications, VP of Multicultural Affairs, Student Athlete Advisory Council Representative, Inter-Greek Council Representative and Class Presidents for current class year. Non-voting members of the Executive Board are the SAAC Representative and the IGC Representative.

Student Activities Fee (SAF)

The SAF is collected by the College at the direction of the Student Government Association and is used to fund co-curricular student organizations. Proceeds of the SAF are controlled and disbursed by the SGA Budget Committee. The SAF is currently set at \$430.00 (\$215 each semester) per enrolled, undergraduate, full-time student.

It is considered a privilege to receive money from the SAF. In order to provide for effective and efficient operations of the SAF, all organizations receiving funds are subject to the rules, regulations and penalties established by the Budget Committee.

Tax Exempt Certificate

This certificate is used when purchasing items for an organization or a department. Since Trinity College is a non-profit institution, the school has tax-exempt status. This certificate is usually faxed to a vendor, or sent with an order, to verify that our purchase will not be charged sales tax. **Copies of the Tax-Exempt Certificate are available in the S.L.E. office - Mather Hall Room 107.**

Zero Based Budgeting

Student organization budgets are built up from \$0.00. Instead of cutting costs and expenses, all allocations will be built-up rather than cut, which allows for student organizations to plan their semester/yearly programs and operating costs ahead of time.