Contact Information

- Student Government Association Office: 420 Student Union Building
- Committee Members: Chairman Jeremy Tibbetts, Vice Chairman Derek Dunlea, Senator Joseph Kerlin-Smith, Senator Alex Corcoran, Senator Sarah Nordberg, Senator Jenn Hirst, Senator Tim Conceison, Senator Mahdia Hunt, Senator Alex Stassis, Senator Justin Bates, Senator Esther Jones, Senator Jessica Williams
- Email: sgawaysmeans@umass.edu
- Chair & Committee Office Hours: February 2nd-15th from 9:00 AM to 5:00 PM in the Student Government Association Office

Introduction

The Student Activities Trust Fund (SATF) is a mandatory $131 fee each undergraduate student pays at the University of Massachusetts Amherst per academic year. These funds are allocated by the Ways and Means Committee of the Student Government Association to student groups in a viewpoint-neutral manner based primarily on the criteria reviewed below. Please read the Funding Priorities for an understanding of what the committee considers during the allocation period.
Budgeting Process

A new budgeting system has been established to replace the previous Microsoft Excel workbooks. The process now takes place via an online budgeting system, which can be accessed from the home page of Campus Pulse in “Campus Links” under “FY17 Fee Budget Request,” or directly at this link: https://umass.campuslabs.com/budgeting/.

ESOs that are going through the budget process as a council will submit their budgets to a council allocation committee, and will make a short presentation to that committee about their budget request. All other ESOs will submit their budget requests directly to their advisor, who forwards it to the Ways & Means Committee.

Each Established Student Organization (ESO) is strongly recommended to attend the budget training provided by their specific council. This training will be led by Thomas Szumita, the Director of Finances and Business Services for Student Engagement, and Ways and Means Committee Members. If you are not sure which council your ESO is a part of, visit the Student Organization Resource Center (SORC), located in room 208 of the Student Union. If you have additional questions, please either email the Committee or stop by the SGA Office during the Committee’s office hours.

All budgets must be submitted by the deadline of February 21st, 2016. Preliminary budget allocations will be released through the Campus Pulse Budgeting System on approximately March 20th, 2016, with an appeals period that ends April 3rd. The appeals period is used when an organization feels there has been a significant miscommunication or misunderstanding in the review of the budget request. ESOs should also be aware that the committee reserves the right to both increase and decrease a group’s allocation amount after an appeal. Once the preliminary budget and the appeals process has been completed, the budget as a whole will be voted upon by the Student Government Association Senate and be sent to the Vice-Chancellor for Student Affairs & Campus Life for final approval.

Fiscal Year 2016 Budget Timeline
(Est.) January 26, 2016 - April 25, 2016

*IF YOUR ADVISOR TOLD YOU DIFFERENT DATES, FOLLOW YOUR ADVISOR’S TIMELINE*

January 26, 2016: Budget worksheet available on Campus Pulse

February 2, 2016: Ways and Means office hours begin

February 15, 2016: Ways and Means office hours end
February 15-28, 2016: **ESOs budgeting within their councils can begin presentations**

February 21, 2016: *All ESOs must have submitted their budget request to their advisor/council*

March 20, 2016: **Initial allocations will be emailed out to all ESOs and appeals begin**

April 3, 2016: **Appeals conclude**

April 11, 2016: **Presentation of S-1 Budget Act to Senate**

April 18, 2016: **S-1 Budget Act becomes Special Motion in SGA Senate**

April 25, 2016: **Final meeting of the SGA Senate, whole budget is voted on**

**Eligibility Criteria**

To be eligible for receiving funds, all organizations must:

- Be active for at least the Spring 2015 and Fall 2015 semesters
- Submit budgets by the deadline of **February 21, 2016**

**Funding Guidelines**

The committee will be using the following guidelines to determine the amount allocated to each committee (guidelines are not in any particular order):

- **Revenue Contribution:** The organization shows initiative in finding additional revenue sources outside of SGA funding, if additional revenue is collected, the ways in which it was collected is thoroughly explained. State whether members benefit from the group, and if so do they contribute appropriately through dues or other means.
- **Relevance to the Group’s Mission Statement:** The requested funds are appropriate and essential to the group’s mission statement.
- **Management History:** Past spending is consistent with stated objectives and budgets; the group has a record of past accomplishments and effectiveness.
- **Opportunities for Student Body:** The request provides opportunities for student involvement through membership, participation and event attendance.
- **Quality of Budget Request:** The budget request is well-organized, filled out thoroughly (adding notes when necessary to explain certain details or requests), and on time. It has been reviewed by the group’s advisor.
- **Cost/Benefit to the Student Body:** Is the request a feasible and reasonable use of funds based on how it will benefit students not only in the club, but throughout the student body? Does the outcome justify the requested funds?
Note: The Committee will only allocate funds for food, travel, and lodging if the items are necessary for the success of the organization's overall mission.

Guidelines for use of Student Activities Fee

Fee money: These funds come from the mandatory activities fee that is assessed to all UMass undergraduate students, and should be used in ways that enhance student activities and the undergraduate experience outside the classroom. Uses that primarily benefit individual students or members of student organizations, rather than the campus community, should be avoided. Generally, fee money should not be used or requested for:

1. Food for group members or group events unless it is essential to the purpose of a public event (i.e: regional food for a cultural night).
2. T-Shirts, uniforms, or other apparel given to group members and not maintained in club inventory for re-use.
3. Gifts, awards, or scholarships.
4. Donations to outside groups
5. Banquets or similar celebratory functions for a group.
6. Travel expenses not essential to a group’s mission.

Clarifications or exceptions to the above require the approval of the SGA Secretary of Finance and the Student Engagement Director of Finance.

Additional Notes

Use Comment Boxes
The use of comment boxes allows the Ways and Means committee a better understanding of the needs of the organization and of the importance of the specific line item. Please indicate any major events, activities, and any other relevant functions, that are critical to the organization and its purpose or mission.

Do Not Rush Your Request
Fill out the request carefully and thoroughly. Extensions will not be given unless the committee has determined that there were extenuating circumstances the cause the organization to be unable to complete their budget on time.

Present your Impact on Campus
In addition to highlighting your impact amongst the student body, feel free to submit links to any associated articles and publications in which your group has been featured.

Keep Copies of Requests
Much of the budgeting process is done on the computer, and technical mishaps do happen; keep an electronic copy for your group’s records, take a picture when you submit the budget, etc.

Review your budget request with your Advisor
Your advisor can help you fill out your request accurately; they will sign off verifying if you have reviewed your budget request together. If you do not have an assigned advisor,
the SORC (Student Organizations Resource Center, 208 Student Union), will review it for you.

**Include information that the Committee cannot see**
If your ESO is applying for other grants or has an account with a national organization, let us know! The committee can only track what comes through your revenue and fee accounts, so we need

**Budget Request Checklist**
- Attend the required budget training session provided by your ESO’s council
- Review the Funding Priorities
- Write your request; use comment boxes and save your progress
- Review request with your Advisor
- Contact the Committee if you have additional questions (Check out the Committee’s office hours)
- Submit your budget workbook by the **Deadline: February 21st, 2016 via Campus Pulse Budgeting System.**

Visit the Campus Pulse Homepage and click on the budgeting link

**Major keys to success/Q&A**

1. When filling out your budget, make sure that the name you put in at the beginning is “FY17 Budget Request.” Since requests stay in your group for historical purpose, you will be helping future treasurers with this!

2. There are only 2 situations where you want to press “add another ______ section” instead of “add item,” and those are for events or transportation. When you press “add item,” it adds details about the section you are in (e.g. you are budgeting the cost of flyers for the year in the publicity section, you are giving details for the costs of a speaker or equipment at an individual event). Press “add another ______ section” for a separate event/trip (e.g. after budgeting for the Cape Verdean Cultural Night, when you want to add all the costs that go into the Cape Verdean Awareness Week, you go into the “add another event section,” name that event “Cape Verdean Awareness Week,” and then press “add item” under that heading for all of the costs of that event).

3. Revenue in the new doc is a little complicated. Any revenue that you enter into the “income amount” line will **subtract from your total request amount.** This means if you enter $500 into the income amount for a fundraiser, your **total FY17 budget request amount will be reduced by $500,** because when you enter a number into income amount it is implied that you will be spending that amount in the coming fiscal year. To rephrase, **do not put any number into a revenue category’s income amount if you want to have that money after the 2016-2017 school year.** The “carry over revenue” line item is for revenue that you want to
keep after the coming year. Write in the description of the “carry over revenue” line item and the line item where are you getting the money how much is going over (if my fundraiser is raising $1500 and I want $500 to go past the next school year, I would write in the description that I am raising $1500 and saving $500. This would mean I only put the number $1000 ($1500-$500) in the “income amount” line for that fundraiser.”

Because the “carry over revenue” line does not affect next year’s (FY17) budget request, the “income amount” should remain $0 for the “carry over revenue” line. If you have multiple sources for carry over revenue, please explain them in the descriptions for all fundraisers that are generating them and itemize them in the description for the “carry over revenue” section.

To summarize: only put revenue that will be spent next year in a line called “income amount.” All other revenue generated by your fundraising (even if it is from the same fundraiser but you want to save it) should be explained in the description of the “carry on revenue” item, which should have a 0 in the income amount when you are done.

4. One of the kinks that we have not been able to fix in Campus Pulse is that every active roster member of your ESO will get an email when you submit the budget. We have yet to find a workaround for this with Campus Pulse, but are working on it!