



NYU

Center for
Student Life

All - University Club Budget Request Procedures 2019-2020

**Presented by the 2018-2019 Student Activities Board
Please direct inquiries to sab.club@nyu.edu**

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Budget Request Procedures

Deadlines and important considerations

It's that time of year again! As each club is preparing to transition their eboard for the next year, the following tasks must be completed in order to request a budget:

- Held elections for at least the 2019-2020 President and Treasurer
- Entered in new elected officers on NYU Engage, by updating your club's profile

Starting April 1st, each All-University Club will be able to complete the two parts of the budget submission through NYU Engage:

1. Submitting the SAB Budget
2. Submitting the SAB Lump Sum Allocation
3. Submitting Corporate Seamless Users

The deadline to complete your budget request for the 2019-2020 Academic Year is **April 15, 2019 at 11:59 PM EST**. If you have any questions, please feel free to email us at sab.club@nyu.edu.

Please note that:

- Late submissions will result in an automatic 5% reduction of your allocation.
- SAB Clubs must attend Center for Student Life sponsored Club Management Training each semester to receive their SAB Budget.

2019-2020 SAB Budget Request

How to request what you intend to spend

- This is an outline of you intend to spend your funding per event for both the Fall 2019 and Spring 2020 Semesters.
- The SAB Budget must outline at least three events per semester (or 1 publication per semester, if the group is a recognized publication).
- Events must have specific line items, with specific prices for each expenditure. [Refer to the SAB Spending Guideline when planning your budget.](#)

Event Guidelines

- Events which are outlined must be open to the entire campus community.
- Events which are outlined must be **on campus**.
- Off campus do not count as one of the three events per semester, may not be included in the SAB Budget, and can only be funded through a contingency request or income.
 - Service related day-trips in the five boroughs of New York and pre-approved rehearsals **are the only exception to this rule.**
 - Off Campus Events, off campus retreats, off campus competitions, or off campus conferences, and any other travel must be approved by SAB and can only be funded through contingency or income. [Refer to the SAB Contingency Guide when planning these events.](#)

Budget Request Bracket

- In an effort to improve baseline budgets and promote equity across all clubs, SAB asks that groups adhere to the following bracket when submitting 2019-2020 SAB Budget Requests.
- As resources are limited, please be mindful when submitting Budget Requests. Only ask for what you believe your group will actually use. Any unspent funds at the end of the academic year will reflect poorly on the fiscal responsibility of the group, and may impact the allocation of SAB funds in future years.
- Budgets will be reviewed on a case-by-case basis and awards shall be decided by the quality of the request and relevance to the club mission.

Current Lump Sum Allocation	Increase Request for 2019-2020
Under \$2,500	Up to \$2,500 or 15% increase
\$2,500 - \$5,000	Up to 5% increase
\$5,000 - \$10,000	Up to 3% increase
Above \$10,000	No increase permitted

2019-2020 SAB Lump Sum Allocation

How to track expenditures during the year

- The SAB Allocations committee will review your SAB Budget and allocate a Lump Sum for the 2019-2020 Academic Year.
- Your Lump Sum is the amount that your club is approved to spend.
- This feature is updated with each expenditure that is made and allows you to see how much money the group has spent, the details of the expenditure, and how much of your allocation remains.
- Unspent SAB funds at the end of Fall 2019 will roll over to Spring 2020. Unspent SAB funds at the end of Spring 2020 will be forfeited, and will not roll over to Fall 2020.

Submitting your SAB Budget Request and Lump Sum Allocation

How to submit your Budget Request by April 15th

PART I: Submitting your SAB Budget Request

1. Sign in to NYU Engage
 - <https://orgsync.com/login/new-york-university>
 - Click on “Sign in with NetID”
2. Navigate to your Club’s Portal by using NYU Engage’s search bar
3. Navigating into “Treasury” from your Club’s Portal
 - Hover mouse over “More” → “Click on “Treasury” → Click on “Manage Budgets”
4. Click on “New Budget”
 - This is located on the right hand side of your screen.
5. Complete the “Budget Title” Field
 - The title must be “**2019-2020 SAB Budget**”
6. Complete the “Budget Period” Field
 - Please select “**SAB Budget [Fall 2019-Spring 2020]**” from the options presented
7. Complete the “Budget Details” Section
 - This is where you enter the details of your events.
 - You must create a new “Budget Item” for each SAB event you plan to hold
 - “Item Title”: This is the event’s name, e.g. Noodle Eating Contest
 - “Category”: Please select “**Fall 2019 Events**” from the options presented
8. NYU Engage will now require you to complete an “Attached Form”
 - Please click on “Fill out attached form”
 - “Event Name” e.g. Noodle Eating Contest
 - “Event Date” e.g. October 2, 2019
 - “Event Location” e.g. Kimmel 802
 - “Projected Attendance” e.g. 85
 - Please ensure that this is a realistic number. The SAB Allocations Committee will be reviewing projected attendance numbers against your club’s roster and attendance sheet.
 - “Event Description” e.g. Our club has a longstanding history of great noodle eaters. Every year we host a Noodle eating contest to see who the new champion will be. This event brings the members of our club together to cheer on their favorite noodle masters, and is our most popular event of the semester.
 - Please be as detailed as possible. The SAB Allocations Committee takes into consideration the completeness and seriousness of each request.
9. Complete the “Line Items” Field
 - This is where you fill out each specific expenses required for each event
 - You must break down expenses according to expense type.
 - In the “Description” field, please tell us what you plan to purchase. In the “Request a Budget” field, please type in the cost of the expense

- E.g. The Noodle Club needs to purchase noodles and soda for their Noodle Eating Contest. They also need to advertise on campus which required printing flyers to ensure their event is well attended.
- They would select “*Food Expense*” > Type in “Noodles & Soda” in the “*Description*” field > Type “300” in the “*Request a Budget*” field.
- They would then click on “*Add Line Item*”.
- They would select “Advertising and Copying” > Type in “Printing Flyers” in the “*Description*” field > Type “60” in the “*Request a Budget*” field.
- **Please ignore the “*Spend from Revenue Fund*” field.**
- If you don't require funds for a specific event, create the budget item and leave the “*Request a Budget*” field empty.

10. Complete the “*Summary*” Field

- You may include additional information as needed.
 - If you need an exemption to the spending guidelines, please provide a detailed explanation as to what exemption you are seeking and why such an exemption would be necessary. Do include specifics where possible.
 - **Do not ask** for an exception regarding off-campus travel/events.

11. Click on “*Add Budget Item*”

- This should be the second event you plan to host in Fall 2019
- Please follow steps 7-10 found above as the process is identical for each event Please ensure that you have **at least three (3) events** listed for each semester
- **Additionally, if you are requesting an allocation for your general meetings, feel free to lump all general meetings for the semester into one budget item, but in the description field please remember to describe the frequency of the meetings (i.e. 6 times in the semester).**

12. Listing your Spring 2020 Events → Click on “*Add Budget Item*”

- This is where you enter the details of your events.
- You must create a new “*Budget Item*” for each SAB event you plan to hold
- Please follow steps 7-10 found above as the process is identical

13. Please note that “**Total for Revenue Fund**” field should be **ZERO**

14. Uploads Section

- Please free to upload any supplementary materials you feel would support your budget request. Examples of possible documents to upload would be invoices from expenses incurred during similar events held in the past, and Kimmel and Top of the Square bills.

15. Please remember to click “**Submit**” or it will not record as being submitted

Submitting your SAB Budget Request and Lump Sum Allocation

How to submit your Budget Request by April 15th

PART II: Creating a SAB Lump Sum Allocation

1. Sign in to NYU Engage
 - <https://orgsync.com/login/new-york-university>
 - Click on “Sign in with NetID”
2. Navigate to your Club’s Portal by using NYU Engage’s search bar
3. Navigating into “Treasury” from your Club’s Portal
 - Hover mouse over “More” → “Click on “Treasury” → Click on “Manage Budgets”
4. Click on “New Budget”
 - This is located on the right hand side of your screen.
5. Complete the “Budget Title” Field
 - The title must be “**2019-2020 SAB Lump Sum Allocation**”
6. Complete the “Budget Period” Field
 - Please select “**SAB Budget [Fall 2019-Spring 2020]**”
7. Complete the “Budget Details” Section
 - You must create a two “Budget Item” for each semester of AY 2018-2019.
- 7a. You will first create one for Fall 2019.
 - Please click on “Add Budget Item”
 - “Item Title”: The title must be “**Fall 2019 Events**”
 - “Category”: Please select “**Fall 2019 Total Amount Requested**” from the options presented
 - You must have two (2) “Line Items” per Budget Item
 - The first “Line Item”: Please select “**Fall 2019 Total Amount**” from the options presented. In the “Description” field, please type in the the total amount you are requesting for your Fall 2019 budget. Please leave the “Request a Budget” field blank
 - The second “Line Item”: Please select “**Lump Sum Amount (SAB USE ONLY)**” from the options presented. Please leave the “Description” field and the “Request a Budget” field blank
- 7b. You will now create one for Spring.
 - Please click on “Add Budget Item”
 - “Item Title”: The title must be “**Spring 2020 Events**”
 - “Category”: Please select “**Spring 2020 Total Amount Requested**” from the options presented
 - You must have two (2) “Line Items” per Budget Item
 - The first “Line Item”: Please select “**Spring 2020 Total Amount**” from the options presented. In the “Description” field, please type in the the total amount you are requesting for your Spring 2020 budget. Please leave the “Request a Budget” field blank
 - The second “Line Item”: Please select “**Lump Sum Amount (SAB USE ONLY)**” from the options presented. Please leave the “Description” field and the “Request a Budget” field blank

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8. Please note that “**Total for Budget Fund**”, “**Total for Revenue Fund**”, and “**Grand Total Requested**” field should be **ZERO**
9. Please remember to click “**Submit**” or it will not record as being submitted

Corporate Seamless for Clubs

Registration begins April 1st for the 2019-2020 year

- Seamless is an online food ordering service that allows users to order food for delivery and takeout from restaurants through their website or mobile app.
- Clubs are permitted to assign **one** or **two** Seamless Users.
- **New this year:** Seamless Users must be submitted in conjunction with SAB Budget Request by **April 15, 2019**. Register Seamless Users through the “Fill a Position” function on NYU Engage.

Seamless Users:

- Must be current, matriculated students.
- Must be able to hold the responsibility of managing Seamless for **both** the Fall 2019 and Spring 2020 semesters.
- Seamless users should not be students who have plans to study abroad for the entirety of the Fall or Spring semester and should not be students who are graduating after the Fall semester)
- May **not** be the Seamless User for more than one club.
- Must complete the Seamless User Agreement upon being registered as a Seamless User.

Registered Seamless Users will be able to place orders on behalf of the club. They will also be responsible for the following duties, outlined in the Seamless User Agreement:

- Maintain the security of the user's SEAMLESS Club Account login and password.
- Ensure that only designated All-University club funding sources such as the SAB Lump Sum Allocation budget, an Approved Contingency, are used to fund SEAMLESS food purchases.
- Ensure that there are sufficient funds in the designated funding source to cover SEAMLESS Club Account food expenses.
- Adhere to SAB Spending Guidelines pertaining to food expense purchases. No SEAMLESS orders should exceed 500 dollars.
- Ensure that there is an Approved Club Event Form to support each SEAMLESS food order placed.
- Post the club's SEAMLESS charges directly to Orgsync no later than 3 days after the date the Order Confirmation email from SEAMLESS is received with a copy of the SEAMLESS final order confirmation as an attachment to the posted SEAMLESS entry.
- Place orders **ONLY** for the club they are registered with.

Appendix I - SAB Spending Guidelines

What is fundable, and how much should my club request for items?

Current as of April 2019

- SAB funds shall be used to promote the interests of NYU student organizations only.
- Every attempt must be made to ensure that activities and services which are subsidized by the SAB are accessible to the University student population at-large.
- SAB Clubs must host three (3) open-events per semester, Publications must issue one (1) publication per semester.
 - Events are considered “open” if they are advertised through NYU Engage **before the event takes place**.

1. All-University funds **cannot** be used:
 - a. In a manner or for any purpose, which violates any policy of NYU as determined, enforced, and/or interpreted by appropriate University officials
 - b. In a manner or for any purpose either specifically prohibited by the SAB when an organization’s budget was reviewed or otherwise prohibited in the SAB rules
 - c. To pay a stipend to any club member drawn for All-University funds or profits derived thereof (Exception: NYU student DJ registered with the Center for Student Life)
 - d. To pay honoraria to any member of the New York University community. Not payable to NYU students, faculty, administrators, staff or individuals recognized as NYU affiliates
 - e. To purchase alcoholic beverages
 - f. To fund closed club events
 - g. To fund off-campus events unless the event is pre-approved by the SAB and your Center for Student Life Advisor
 - h. To purchase gift cards
2. SAB approval must be obtained for purchase of following items or services: travel, articles of clothing or accessories (e.g. T-shirts, jewelry, wigs, costumes, makeup); athletic equipment; gaming equipment; promotional material (including off-campus advertisement) other than fliers, posters, banners, buttons or internal newspaper advertisements; furniture; accessories; or capital expenditures of any kind.
 - This document represents an excerpt from the SAB guidelines. These spending guidelines may be superseded by NYU or IRS guidelines in expense payment and reimbursement.
 - For more information about the SAB contact the committee directly at: sab.club@nyu.edu
 - See your Center for Student Life advisor with additional questions regarding All-University club policies.
3. The following list contains expense items for use by SAB-funded clubs in good standing. The expense items with an adjacent amount (e.g. honoraria \$500/person) represent the items with a pre-approved expense limit. Club expenses in **RED** must be approved separately by the SAB. In order to have an expense approved, include it in the SAB Budget Request, provide the amount requested with an expense description.

Exceptions to any of the below SAB guidelines may be requested in writing to the SAB when submitting an SAB Budget Request.

Item	Limit	Notes
Advertising & Copying	\$80/event	
Printing/ Copying	---	Included in Advertising & Copying limit
Facebook/ Google Ads	---	Included in Advertising & Copying limit, must be targeting the entire NYU community
Snapchat Filters	---	Included in Advertising/ Copying limit, area covered must include an NYU building. Filter design must be approved by Advisor
Apparel Purchase or Rental	\$10/unit	NEEDS SAB APPROVAL - must be available to all members
Awards & Non-Cash Prizes		Includes promotions & giveaways. Approximately \$1/attendee and under \$150/event, NO GIFT CARDS.
Decorations & Event supplies	\$200/event	Excludes office supplies
Flowers	---	Included in decorations and event supplies limit
Serving materials & utensils (plates, cups, spoons, forks etc.)	---	Included in decorations and event supplies limit
External Space Rental	Cost Varies	Depends on location, catering, staffing, etc.
Food Expense	\$5/attendee	May vary for dietary needs, cultural food requirements, or scale of event
Payment for Services	---	
Disc Jockey	\$400/event	
Honorarium	\$500/person	Payment given for professional services that are rendered nominally without charge (e.g. speakers, performers)
Professional Services		Payment given for professional services that are rendered with charge (e.g. make-up services for models)
Misc & Other Expense		MUST BE SPECIFIED
NYU Charges	---	
NYU Media Services & Staff	Cost Varies	Depends on location, staffing, etc.
NYU Space Rental	Cost Varies	Depends on location, length of event etc.
Ticket Central	Base: \$125	Additional costs may be incurred if > 400 attendees
Office Supplies	\$150/semester	Arts and Crafts, Postage, Pens, Markers, Paper
Travel		NEEDS SAB AND ADVISOR APPROVAL
Video/Film (Rental & Copy Rights)		

Appendix II - SAB Contingency Guidelines

How/When to request additional allocations

The purpose of Contingency funding is to financially support all-university clubs when a new opportunity arises. Contingency funding should be limited to expenses relating to new activities or unanticipated activities/expenses not contemplated at the time a club request was prepared or falls in one of the following categories: basic travel, complex travel or capital expenditures.

The SAB may consider the following criteria in determining contingency allocations:

- The relationship between a club's stated purpose and the nature of the activities
- The club's compliance with SAB, CSL and University policies including the club's financial history and frequency of on-campus activity

Eligibility

All organizations requesting funds must be recognized and in good standing. Allocations must be financially reasonable in nature and follow the criteria shown below.

Special On-Campus Events

- This includes new or unanticipated activities, incurring expenses not contemplated at a time a club budget was requested.
- Contingency requests for this category must be submitted at least 21 days in advance.

Capital Expenditures

- This includes club resources that serve long-term purposes, including but not limited to office supplies, banners and equipment.
- Contingency requests for this category must be submitted at least 21 days in advance.

Basic Travel

- This includes any non-service or recreational day-trips within the five boroughs of New York, that are aligned with the club's mission and goals.
- Clubs must adhere to travel procedures when requesting contingency and planning for travel. Clubs may be asked to present the details of their trip to SAB and the CSL Advisor.
- Contingency requests for this category must be submitted at least 21 days in advance.

Complex Travel

- This includes any trips outside the five boroughs of New York and/or overnight stays. This may include, but is not limited to: retreats, conferences, competitions or other club mission related activities.
- Clubs must adhere to travel procedures when requesting contingency and planning for travel. Clubs may be asked to present the details of their trip to SAB and the CSL Advisor.
- When submitting contingency requests for complex travel, groups must submit a cohesive list of all expenses, including: application/registration fees, accommodations, transportation, and any other costs that will be related with the trip.
- Contingency requests for this category must be submitted at least 30 days in advance.

General Restrictions

- Organizations are not limited in the amount of times they may submit a request.
- Organizations are not entitled to any presumed amount due to submission of request. Until final approval, all submitted allocations have the potential of being denied or deferred.
- Unspent funds allocated in a contingency request shall be forfeited to the SAB.
- SAB cannot retroactively allocate contingency funding for events that have already occurred.

Contingency Appeals

- Within five days of receiving an allocation update, clubs wishing to file an appeal must submit an explanatory appeal to sab.club@nyu.edu for their consideration.