



Budget Guide

FY19

Adopted March 26, 2018

Student Activities Commission
Georgetown University

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Budget Process

The standard budget process is the basis of the budget system. All groups must fill out the Budget Request Form in October/November and March/April of each semester requesting an allocation for the following semester. SAC holds a Budget Summit where groups can present, budgets are approved and funds are allocated.

A timeline will be announced during each semester for the budget process. Groups will be given at least ten days to prepare their budgets. Groups will have at least one week following the announcement of allocations to submit appeals.

Budget Preparation

Student groups work with their Commissioners and Center for Student Engagement advisors to prepare their budget for the following semester. Budgets should include information about all events except for:

- Travel events
- Conferences that are not eligible for an allocation from SAC at Budget Summit (see Travel, Fundraising, and Conferences sections)
- Space costs (both on- and off-campus)
- Security costs
- Equipment costs (seating, lighting, DJs, set-up costs, etc.)

Groups are required to hold a minimum of three events each semester and are expected to hold a level of programming that closely resembles what was applied for during the budget application process. SAC encourages groups to put as much detail as possible on the budget form, but recognizes that not all event information will be available at the time of submission. As such, for some events, groups will not be able to include detailed information. In general, the more expensive or unusual an event is, the more information that is necessary. Budget Submission Forms must be completed in order to be considered during the Budget Summit. Groups should consult their Commissioners with questions or concerns during the budget preparation phase.

Student organizations that fail to submit the budget form will be admitted to the Restoration process and will have up to three semesters to meet the Commission's standards. Failure to meet the Commission's standards will lead to a revocation of the organization's Access to Benefits.

Restoration Process

If a group is admitted to the Restoration Process, SAC will not consider their budget at the Budget Summit. The student organization will have full access to the Ad Hoc and Travel funds in the upcoming semester, and must complete at least two inward focused events (e.g. general body meetings, retreats, etc.), and one outward focused event (one that is open to and engages the broader campus community). Note that this is the minimum requirement and groups are strongly recommended to do more. A group in Restoration may not receive a total allocation from SAC's Ad Hoc fund greater than the total amount they received from the Commission in their last analogous budget allocation.

Every group wishing to exit Restoration must present to the full Commission to be considered. A vote to withdraw from or continue in the Restoration Process will be done at the end of the semester, preferably before Budget Summit. If a group wishes to exit the Restoration process, they must submit a Budget Submission Form even if they are removed from Restoration after the Budget Summit.

During the semester, Commissioners will check in with groups in Restoration at least twice. Groups should meet with their Commissioner once at the beginning of the semester to establish what the group hopes to achieve, and another time later in the semester to prepare for their presentation.

Criteria for being admitted to the Restoration Process can include, but are not limited to:

- Failure to submit a budget form
- Breach of SAC and/or University policy
- Failure to submit accurate EAFs in a correct and timely fashion

Criteria for being removed from the Restoration Process can include, but are not limited to:

- Demonstrated understanding of SAC's initial reason for placing the organization in Restoration
- Board roles, in relation to SAC policy, are clearly defined
- Demonstrated active club membership
- Consistent communication with Commissioner
- Effective leadership transitions and election processes
- No Event Completion Forms, except in extenuating circumstances

Organizational Investments & Operational Expenses

Organizational investments and operational expenses should be included in the Budget Submission Form. These investments and expenses generally refer to non-event expenses. An organizational investment is intended for multi-year use. It remains the property of the university and does not belong to any individual student within the organization. Operational expenses are intended for non-event operation of the student group over the course of the semester. Organizational investments and operational expenses are evaluated with extra stringency and costs should be explained in detail in the Budget Submission Form. There is a \$1,000 total limit for all organizational investments and operational expenses per group per semester. Because they should be included in the Budget Submission Form, organizational investments and operational expenses are not eligible for ad-hoc funding unless the group can prove the costs are completely unforeseen.

SAC offers limited storage space for student groups as requested. Storage space must be properly maintained by the individual student group, with each group filling out the SAC Storage Form for their organization's items if they decide to use storage. There cannot be any perishable or personal items stored in the space provided. Groups are required to take inventory of the items in their SAC storage spaces before requesting additional funding for an organizational investment in their budget submissions.

Coaches and Instructors

SAC will consider funding coaches and instructors at 20% of the cost per semester (up to \$35 per student per semester).

Budget Evaluation

Budgets will be evaluated with reasonable consideration. Specifically, evaluations are based on:

- Each event's type and its relation to the group's mission
- Recent semesterly allocations and programming history
- Number of Active Members (i.e. members that regularly attend events)
- Responsible use of SAC's limited resources

- No SAC funds being spent on alcohol, tobacco, weapons, etc., and appropriate use of such goods
- Compliance with Student Organization Standards and other GU policies
- Whether overall benefits accrue primarily to undergraduate students in the GU community
- Consideration of whether some cost should be borne by students

All student organizations are required to spend at least 50% of their allocated funds by the time of submission of the budget request form for the following semester. This information will be collected by including the balance of the Hoyalink Finance account and additional anticipated charges that have yet to be reflected in the University financial system. Failure to spend a minimum of 50% of allocated funds will result in the group being placed in restoration for the following semester, pending any extenuating circumstances and the review of the Commission.

Event Approval Process

Event Authorization

All events must be submitted to SAC using the Event Authorization Form found on SAC's Hoyalink page. The Event Authorization Form requests basic event details and contact information and has a series of checkboxes for different potential areas of risk. Events with risk must be reviewed and voted upon by the Commission. Events with risk should be submitted at least two weeks prior to the SAC meeting that immediately precedes the event. SAC cannot guarantee approval or funding for requests submitted beyond this deadline.

Events with no risk factors checked will be automatically approved when the Event Authorization Form is submitted. While we strongly encourage you to plan all events at least two weeks in advance, risk-free events can occur on a shorter timeline.

Any events that have not been approved are not permitted to occur. Commissioners will ensure that their group is notified if and when an event is approved. Commissioners may also notify groups that more information is required before approval is granted. Groups will have access to their funds once their Event Authorization Form has been approved. Groups are strongly encouraged to

communicate with their SAC Commissioner before submitting an Event Authorization Form.

Event Authorization Form Checklist

The Event Authorization Form includes a checklist. These checks refer to various risk issues outlined by Georgetown University's Office of Risk Management and CSE. In addition, there are checkboxes for fundraising and ad-hoc events.

The checklist consists of the following:

- ☐ Alcohol Present, even if not paid for by SAC
- ☐ Over 200 estimated participants
- ☐ Contracts involved
- ☐ Overnight stay
- ☐ Strenuous or high-risk physical activity, including physical combat or endurance contests
- ☐ Weapons, sporting or otherwise, or replicas of weapons will be present
- ☐ Non-Georgetown minors (under the age of 18) will be present
- ☐ Distribution of prizes
- ☐ Fundraising
- ☐ Non-GU organization participating
- ☐ Non-GU speaker
- ☐ Travel outside the Beltway (I-495) and not Metro accessible
- ☐ Ad-hoc Funding Request

If an organization checks any of the above boxes, it will be required to provide more event details on the Event Authorization Form, and the event will have to be evaluated by the Commission. Commissioners may present on a group's behalf at their discretion. If an organization fails to check a box that applies to the event being considered, the event may not be approved, or approval may be rescinded after the fact. Additionally, groups that fail to correctly complete the risk checklist may be subject to sanctions, including but not limited to reductions in allocations, prohibitions on holding events, access to benefits review, stricter event approval requirements or removal of access to benefits.

Budget Modifications

Groups are expected to execute a level of programming that closely resembles the level that was detailed on their budget form. While the exact nature of events may change, the overall semester of programming should be comparable to what was applied for during the Budget Summit. If a group executes a level of programming that the Commission deems to be significantly lower than that which was outlined on the budget form, SAC will consider this factor at the upcoming Budget Summit when evaluating the group's following budget application.

Event Completion

If an organization holds an event without SAC approval, the organization may come before the Commission at any time within the semester the event occurred during to provide proof that the event occurred so that they can access their University financial account and have their event considered “completed” but not approved on their budget. If the Commission decides that there is sufficient evidence to prove that the event occurred, the event will be considered completed.

Criteria for “sufficient evidence” include, but are not limited to:

- Pictures taken at the event
- Screenshots of Facebook event, flyer/poster, or any other promotional material
- Event planning email correspondence, with timestamps visible

Each organization may submit up to 2 events via the Event Completion Form for consideration by the Commission, provided they have no associated ‘risk factors’ as listed in the Event Completion Form section. Additional events submitted for completion may be subject to sanction at the discretion of the Commission, including but not limited to sanctions related to organizational programming and financial allocations. Depending on the risk factors associated with an event submitted via the Event Completion Form, the Commission has the right to impose additional sanctions.

Fiscal Year Balances

Groups are required to end the fiscal year with a positive or \$0 balance. SAC strongly encourages all student groups to keep independent financial records. If a group

completes the fiscal year with a negative or positive balance greater than 10% of their total budget allocation for the fiscal year, that group will be penalized with a reduction of this same percentage from their next fiscal year budget. For instance, if an organization possessed a 12% negative balance in FY2017, 12% would be deducted from FY 2018. On the other hand, if an organization possessed a 3% negative balance in FY 2017, they would face no requisite reduction in FY2018. The 10% leeway is intended to account for any discrepancies and unintended expenses, and SAC still expects all groups to maintain a positive or \$0 balance (unless otherwise authorized). Groups can request to roll over between fiscal years all true demonstrable profits (e.g. earnings from fundraising and donations).

Co-Sponsorships

Groups are encouraged to co-sponsor events with other GU or non-GU organizations. Co-sponsorship is defined as a monetary or non-monetary contribution to separate aspects of the co-sponsored event (ex. one group may request funding for the food, another group may request funding for space, and another group may be in charge of the marketing for the event).

- An Event Authorization Form is required regardless of whether a group requires funds from their University financial account for a co-sponsorship.
- If a co-sponsorship is to be formed among multiple SAC groups, during the budgeting process, or at the time funding is requested, a co-sponsorship form should be completed by all of the involved SAC groups. The form must accurately detail the event attendance, the responsibilities, and the signatures of the Presidents and treasurers of all parties involved for the funding request to be considered.
- Additional University policies govern authorized financial transactions with non-GU organizations. It is the group's responsibility to comply with these policies with the help of their CSE advisor.

Fronting

Fronting is prohibited. According to the Student Organization Standards, fronting is defined as misrepresentation specifically designed to gain access to university benefits, especially facilities, for any person or group that would be otherwise ineligible for such benefits, or eligible at a less favorable rate.

Ad Hoc Approval Process

SAC will consider events on an Ad Hoc basis at each weekly SAC meeting. In advance of any meeting, student groups must submit a completed Event Authorization Form. Student groups must provide a specific, detailed cost breakdown for events being considered for Ad Hoc funding. Groups are generally required to present, though Commissioners can present for a group at their discretion. Groups can only present once on an Ad Hoc funding request for any individual event. SAC can make exceptions at its discretion.

Ad Hoc Funding

Ad Hoc should be used to support events that were unable to be budgeted for at the time of Budget Summit, or were unanticipated and unforeseen at the time the budget was developed. The Ad Hoc process should not be used in lieu of the budget process, and SAC Commissioners will take note of any misuse of the Ad Hoc fund by student groups. SAC will entertain unforeseen ad hoc event funding requests up to \$1000, and will determine the amount of money to allocate to an ad hoc event, even if this value differs from the request by the group. Unforeseen ad hoc allocations constitute no more than 75% of the request. Organizations in Restoration and New Club Development will not be subject to the 75% scale. SAC reserves the right to make additional cuts to Ad Hoc events at its discretion. SAC also reserves the right to fund ad hoc requests of \$100 or under in full at its discretion.

Groups will be notified of the allocation amount and will have the option to deny the Ad Hoc allocation, in which case event will remain approved but unfunded.

Ad Hoc Fund

The Ad Hoc fund will be finite for the semester and this consideration will affect SAC's Ad Hoc funding decisions during the semester. At their request, Commissioners can inform groups of the balance of the Ad Hoc fund.

Ad Hoc Criteria

The Commission will consider ad hoc funding requests with respect to reasonableness, and will examine the following criteria carefully:

- Consideration of why the event was not budgeted for originally
- Importance of the event to the Georgetown community
- Each event's type and its relation to the group's mission
- Recent semesterly allocations and programming history
- Responsible use of SAC's limited ad hoc resources
- No SAC funds being spent on alcohol, tobacco, weapons, etc., and appropriate use of such goods
- Compliance with Student Organization Standards and other GU policies
- Whether overall benefits accrue primarily to undergraduate students in the GU community
- Consideration of whether some cost should be borne by students

Fundraising Process

Groups are permitted and encouraged to fundraise as a means to augment the funding provided by SAC. Fundraising events where the beneficiary is a SAC group are eligible for SAC allocations. Fundraising events where the beneficiary is not a SAC group are not eligible for SAC allocations. Fundraisers will only be eligible for funding if they represent an actual event that provides a benefit to the organization or campus community other than fundraising itself.

SAC will not purchase apparel or other items to be sold by student groups. Fundraising events that are eligible for SAC allocations can be requested through the budget and Ad Hoc processes.

Fundraisers Requiring No SAC Funds

When groups wish to hold fundraisers that do not require any SAC funds, groups can fill out an Event Authorization Form and submit it to their Commissioner to be presented at the next SAC meeting. All fundraisers must be presented to the Commission.

Fundraising Loans

In many cases, groups may require funding to purchase apparel or to host a fundraising event for an outside organization (in which the SAC group donates ticket sales or other sources of revenue). In such cases, groups can request permission to spend down their University financial account from SAC. In order to do so, groups should follow the same procedure as above of submitting an Event Authorization Form, but should also include information with details about the cost of the event or purchase.

Fundraising Profits

Real demonstrated fundraising profits are those earnings from fundraising after costs have been paid and SAC loans have been paid off. Real demonstrated profits can be spent freely by the student group on any approved event, organizational expense or operating expense. If requested, profits carry over between semesters. Profits may also be donated to non-GU organizations.

Travel Event Process

General Information

All events that happen outside the Beltway (I-495) and are not accessible by Metro will be considered separately from group budgets. Groups wishing to travel must submit a Travel Form that details specific costs and details for that travel event, which is an addendum to the Event Authorization Form. Any and all events that happen inside the Beltway (I-495) or are Metro accessible, even if they require travel, should be included on the budget form or approved through the EAF approval process. The Travel fund applies only to transportation, lodging and registration fees. All travel events must be consistent with university travel policies.

Travel Fund

All funding for travel events will be allocated out of the Travel fund. Any scale cut applied to budgets at the Budget Summit stage will not apply to allocations from the Travel Fund. Before presenting to the commission, groups must have contacted their

CSE advisor regarding the travel event. SAC reserves the right not to fund travel events when a group does not adhere to these guidelines.

Overnight Travel

SAC will allocate no more than \$120 per hotel room per night for each travel event. Groups should attempt to book single-gender rooms and lodge 4 students per room.

Funding Percentages

SAC will fund up to four travel events each semester wherein three or more group members are traveling. The first travel event will be funded at 60%, the second will be funded at 40%, and the third and fourth events will be funded at 20%. Travel events will have an upper bound of \$150 per student per trip if organizations are planning to travel more than once a semester. Lodging costs are exempt from these percentages, but not from the nominal cap. Events partially covered by other sources can groups plan to travel more than twice be eligible for smaller allocations, and travel events can always be funded by sources other than the travel fund, including a group's own budget.

The commission will not fund expenses on foodstuffs for travel events. Groups can designate which percentages will apply to which travel events. Groups can seek approval for additional travel events, but SAC will not allocate towards the events. SAC may consider additional travel allocations for extenuating circumstances or unforeseen developments that cannot be predicted with confidence.

Conferences and Competitions Hosted on Campus

SAC defines conferences as events hosted by student groups that are geared toward non-Georgetown University undergraduates, and any event that meets those characteristics, even if not called a 'conference', will be treated as such. SAC will fund conferences up to the percentage of participants who are Georgetown undergraduates, without exceeding 50% of the total cost (e.g. if Georgetown undergraduates make up 30% of a conference's participants, SAC will fund that conference up to 30%) . Groups are expected to come up with the rest of the funding through registration fees, sponsorships, or other methods.

General Policies

Required Trainings

All presidents and treasurers (or equivalent officers) must attend Blueprint training, which is held by CSE and expires after one year of training. A group whose president and/or treasurer does not attend the Blueprint training will not be permitted to program or to access their funds for the semester.

At least three officers of each organization must complete the Bystander Intervention Training course provided by Health Education Services. Organizations that do not meet the requirement may be sanctioned by SAC. Sanctions may include suspension of programming privileges or access to funding for the semester.

Lecture Events

Student groups must submit an EAF for all lecture events, just as any other event. SAC does not fund costs related to honorariums, speaking fees, transportation and/or accommodations for speakers. Funds for these items should be requested from the Lecture Fund. Events accompanying lectures, such as receptions, must be included in the EAF for the event. SAC will fund these events through the standard budget and ad hoc procedures. If the only risk for an event is “Non-GU Speaker,” the event will be reviewed by SAC.

One Budget, Two Parts

Student group budgets and accounts are evaluated at the close of the fiscal year in June. Though they will be funded and approved separately, budgets for the fall and spring semesters of the same academic year will be treated as two parts of one budget. The account balance from the fall semester will roll over into the spring semester for all organizations. All penalties, incentives, and other fiscal decisions will apply to the balance of an organization’s University financial account at the end of the entire academic year.

Georgetown University Police Department (GUPD)

Student groups are required to notify GUPD at <http://police.georgetown.edu/programs/event-security-requests> for events taking place on campus that meet any of the following criteria:

- Controversial speakers/scenarios (as determined by the Commission, not the organization)
- Distinguished guests (e.g. Ambassadors, members of Congress, etc.)
- Anticipated collection or sales of \$500 or more in cash
- Any event with more than 200 anticipated attendees
- Presence of alcohol

After receiving notification of the event, GUPD will decide whether their presence is necessary. Current costs for GUPD services can be found on their website at <http://police.georgetown.edu/programs/event-security-requests>. Requests should be submitted at least ten business days prior to the event date. As a rule of thumb, GUPD will send approximately one officer per 75-100 attendees, but the decision is ultimately at the department's discretion.

Food Costs

For food requests, the Commission will consult, but will not be bound to, the SAC Food Calculator™. The initial food evaluation performed by the Commission referred to as the “food calculator” is as follows:

Beverages = up to \$0.50 per person

Pizza and snacks = up to \$2 per person

Reception-style catering and light meals = up to \$3 per person

Full meals = up to \$5.50 per person

Cultural meals = up to \$8.00 per person¹

All costs not funded by SAC can be paid for with other sources of funding (such as fundraising and donations) or paid directly by the participating students. Student groups are expected to provide honest estimates of attendance and food costs.

¹ A cultural meal will be defined as one that furthers a group's constitutionally-defined mission related to exploring the dining customs of different culture(s).

The food calculator is considered a guideline both during Budget Summit and during the evaluation of ad hoc requests. SAC has the discretion to increase or decrease the allocation based on other standards of reasonableness in food costs. Additionally, SAC will take into account the number of food events that a group is holding and the importance of food to the events. These allocations for food costs include drinks and food service costs, but not other relevant event costs, such as room reservations. SAC will generally not fund transportation for the sake of eating a meal at a particular restaurant (or other establishment).

Alcohol may not be purchased during a SAC-funded meal even if students independently purchase it.

Space and Equipment Allocations

Equipment

SAC will allocate up to \$5 per person for equipment, regardless of whether the space is on or off campus. For example, should a group be hosting an event off campus for 150 people, SAC will allocate a maximum of \$750 for equipment. It is expected that the vast majority of events will cost much less than \$5 per person for equipment. Extraordinary equipment costs will be considered on a case-by-case basis.

All space-associated costs will be allocated on an ad hoc basis. Upon confirmation of the space availability, student organizations are responsible for demonstrating an anticipated attendance warranting funding for such spaces. Off-campus spaces will be funded at an absolute maximum of \$10 per person.

Performances

It is expected that students will pay a portion of the cost of performances costing more than \$5-10 per person. SAC will evaluate performance costs on an ad hoc basis. Performances may be considered as fundraisers.

Movie Screenings

For movie screenings that are open or advertised to the public, student organizations must obtain the rights to show the movie.

Domino's Pizza

CSE has negotiated a discount price and simplified payment method for student groups purchasing pizza from Domino's. One large, one topping pizza costs \$7.99 plus gratuities. Payment can be made using the Domino's Pizza Form available in CSE.

SAC Office Budget

The SAC office budget, which is used to purchase items relating to the operations of the SAC office, will not be subject to standard budget procedures. The following supplies are available to all student organizations at the SAC office, located at 308 Leavey Center:

- Photocopying (black & white only)
- Plates
- Bowls
- Napkins
- Utensils
- Tablecloths
- Paper towels
- Markers
- Poster paper

The Commission will not allocate funds for any supplies which are provided at the SAC office, neither during Budget Summit nor the Ad Hoc process.

Study Days and Exam Periods

Any programming that takes place during study days or the final examinations period must be a study break. As defined by CSE, a study break is an event of no longer than two hours, is free to attend, and requires minimal planning.

Commissioner Evaluation

SAC groups will have the opportunity to evaluate their Commissioners periodically. The SAC Chair will distribute an evaluation form to the President (or equivalent officer) of each organization each semester for feedback.

SAC Constitution

Further information about SAC procedures can be found in SAC's Constitution.

Center for Student Engagement (CSE)

Although SAC must approve all events and allocations for SAC student groups, groups should work with CSE (especially with their CSE advisors) to plan their events and gain access to their funding. CSE Advisors are available during weekly office hours and can schedule meetings with SAC organization leaders.

Other Policies

SAC groups must comply with all other Georgetown University policies. Some of the most relevant policies include, but are not limited to:

- Access to Benefits Policy
- Student Organization Standards
- Student Code of Conduct
- Speech and Expression Policy
- Publicizing Policy
- Residence Life Posting Policy
- Serving Alcohol at student organization events · Web Space Use Agreement
- Vehicle Operations Policy
- Space Use Agreement
- Registrar Policies
- GEMS Policies
- Travel Policy

Revisions to the Comprehensive Budget System Guidelines

SAC may revise these guidelines with a 2/3 vote of the Commissioners in attendance at any SAC meeting where there is a quorum. A one week comment period will precede any vote. To bypass the one week comment period for urgent matters, the vote of the Commissioners in attendance must be unanimous. SAC will seek to provide adequate notification and input to student groups in making changes. SAC will make special accommodations at its discretion where changes to the Comprehensive Budget System Guidelines impact student groups unexpectedly.

The Commission reserves the right to modify and enforce these rules at its own discretion.