Office of Student Activities & Resource Center Funding Process

GENERAL FUNDING PROCESS
Student organizations recognized by the University receive various forms of support from the Office of Student Activities and Resource Center and their respective Student Council. A major portion of the annual Student Activities budget is allocated to student organizations to support programs executed by student groups and the Office of Student Activities and Resource Center, as well as other counterparts within Student Affairs. The Office of Student Activities and Resource Center and Student Councils assist organizations by funding programs benefiting the entire student population.

General Funding Policies:
- Club funding is separated into three types:
  - **Initial Allocation** - provided by OSARC at the beginning of each semester. This allocation is to be used for programming for the semester in which it is allocated. Organizations are not required to submit requests to use their initial funding allocation for events, but are required to follow the spending guidelines and club purchasing guidelines outlined below. Funding decisions are based on amount spent in previous semesters and engagement level, as measured by number of events and attendance.
  - **Supplemental Funding** - Student Council allows for supplemental funding requests to be made once per month. Any student organization wishing to obtain supplemental funding must submit the Supplemental Funding Request Form via NYU Engage by the monthly supplemental funding deadline. Limited supplemental funding is available, therefore, organizations should ensure that they are using their initial allocation to its full potential before requesting supplemental funding. Supplemental funding must be used for the specific program(s) included in the application and cannot be rolled over into another program or another semester. Supplemental Funding can be requested for one of three reasons: (1) New Initiative/Program, (2) Co-Sponsorship with Student Council, or (3) Competition, Conference, Project, or Research.
  - **Revenue Accounts** - Revenue accounts are created for clubs that raise funds through active fundraising and donations. Revenue account balances roll over from year to year and may be used in a future academic year. Monies deposited in the organization’s revenue account may be used for any purchases, including prizes, gifts, conferences, competitions, and other areas where initial allocation and supplemental funding cannot be used, with the exception of giftcards, alcohol/drugs, and any other items, materials, substances, etc. that are defined as illegal and/or against NYU policy.
- All spending, regardless of which funding type is used, must adhere to the Organization Spending Guidelines outlined below.
- Funds will not roll over from semester to semester. If any organization would like to roll over their funding from Fall to Spring semester ONLY, they must meet with their Graduate Assistant to request a rollover by December 1st. Exceptions will be granted by OSARC on a case-by-case basis. No funding can be rolled between academic years.
- All reimbursements, regardless of which funding source they come from, must be submitted within two (2) weeks of the event or the final semester deadline set by OSARC (usually the last day of classes), whichever comes first and must include the original receipt(s). OSARC reserves the right to deny reimbursements that are made after the established deadline.
- Failure to register events on NYU Engage and/or take attendance may result in a reduction in funding for the following semester. OSARC reserves the right to decrease a club’s funding in response to failure to adhere to policies and procedures outlined in the OSARC Student Club
Handbook.

Organization Spending Guidelines

- Initial Allocation and/or Supplemental Funding can be used for:
  - Catering (Suggested $4-$5/pp for snacks, $7-$10/pp for meals)
  - Advertising, printing, copying, etc.
  - Supplies, decorations, etc.
  - General Body Meetings
  - Speaker/Presenter Fees
  - Off-campus events, with prior approval from OSARC

- Initial Allocation and/or Supplemental Funding cannot be used for:
  - Alcohol or other drugs.
  - Prizes.
  - Giftcards.
  - Gifts for participants, presenters, members, officers, and/or advisors including t-shirts and other branded items.
  - Conferences and competitions, unless explicitly approved by the Director of Student Affairs and Student Activities. Organizations are encouraged to solicit outside funding for these opportunities, as they usually only apply to individual students and not the entire organization.
  - Events that are not open to the entire student body. RSVP lists are allowed, but funding is not to be used for closed events such as executive board meetings, volunteer appreciation events, executive board transitions, etc.
  - Fundraisers, including supplies, food, advertising, etc. except where allowed under the fundraising guidelines outlined below.
  - Membership fees, scholarships, etc.
  - Supplies for events outside of the current semester, unless explicitly approved by the Director of Student Affairs and Student Activities.
  - Events taking place during the Summer, unless explicitly approved by the Director of Student Affairs and Student Activities.

- Revenue Accounts cannot be used for:
  - Alcohol or other drugs.
  - Giftcards.
  - Events taking place during the Summer, unless explicitly approved by the Director of Student Affairs and Student Activities.
  - Any other items, materials, substances, etc. that are defined as illegal and/or against NYU policy.
SUPPLEMENTAL FUNDING PROCESS

All supplemental funding requests will be received, evaluated, and determined by the Student Council Finance Committee governing the club submitting the application, either Undergraduate or Graduate. The purpose of the Tandon School of Engineering Student Council Finance Committees is to assure that the funds of the Tandon School of Engineering Student Councils are properly handled for the benefit of all students. To this end, the Finance Committees will hear presentations on, investigate, and deliberate over requests for supplemental funding in a timely and judicious manner.

Basic Overview and Guidelines for the Finance Committee

1. All Finance Committee Request Forms must be turned in by the deadline stated by the respective Student Council Finance Committee, dependent on the date of the event for which funding is being requested.
2. Seeking other sources of fundraising or sponsorships is not mandatory, but is highly recommended. There must also be proof of any other sponsorships or funding when requesting funding.
3. Once the Supplemental Funding Request Form is submitted, you will be asked to present at the next Finance Committee meeting to brief the Finance Committee on why you are requesting these funds and your proposal.
4. There must be proper documentation and detailed explanation of why you are requesting funds and what the funding will be paying for.
5. The recipients of supplemental funding must comply with all the documents and items expected of them within the funding guidelines and policies.

Membership:
- **Undergraduate Finance Committee**: The members of the Undergraduate Student Council Finance Committee will be composed of the Student Council Treasurer (Chair), the Student Organizations Commissioner, and the Tandon Undergraduate Student Council Graduate Assistant. The advisor will be the Director of the Office of Student Activities and Resource Center or their designee/proxy.
- **Graduate Finance Committee**: The members of the Graduate Student Council Finance Committee will be composed of the President, Vice President of Finance, and the Graduate Student Council Graduate Assistant. The advisor will be the Director of the Office of Student Activities and Resource Center or their designee/proxy.

Supplemental Funding Procedure

1. Requesting Supplemental Funding
   a. The Student Council Finance Committees will accept proposals up to one full semester before the initial date of an event.
   b. Clubs and organizations must submit funding requests by the deadline stated by the Student Council Finance Committee, dependent on the date of the event for which funding is being requested.
   c. Funding requests shall be submitted via NYU Engage only.
   d. Funding requests shall only be completed by the primary contact person from the organization, who will need to correspond with the Student Council Finance Committee.
   e. Student Council will only fund retroactively in the event of an error by Student Council or failure of the Student Council Finance Committee to meet on a scheduled date.
   f. Before applying for funding, student clubs must submit Create Event Form via NYU Engage for the event they are requesting funding for.
g. Student Council supplemental funding allocated to student organizations shall be distributed accordingly. Please note that submitting a proposal for a stated amount does not guarantee that the full amount requested will be approved or allocated.

2. Supplemental Funding Eligibility Guidelines

a. Supplemental funding eligibility must be restricted to recognized organizations with good standing with the University and to activities of benefit to NYU Tandon School of Engineering students.

b. To be eligible to submit a supplemental funding budget request for the upcoming fiscal year budget, an organization must be currently recognized by and in good standing with the University.

c. Failure to maintain university recognition may result in recall of remaining allocated funding, both supplemental and initial.

d. All funded events and programs must be accessible in compliance with the American Disabilities Act (ADA) requirements.

e. Allocations are to be expended only for such items and programs approved by the Finance Committee and/or the administrative staff of the Office of Student Activities and Resource Center in accordance with the spending guidelines outlined above.

f. All funded events shall be held on campus unless a compelling case can be made as to why the University is not a proper venue for the event.

3. Student Council shall not fund:

a. Office supplies for student organization operations.

b. Telephone expenses.

c. Club/Org T-shirts, unless otherwise noted for Tandon School of Engineering representation or participation at a competition.

d. Fundraising materials.

e. Athletic equipment.

f. An organization's or individual member's local, state, regional, or national membership fees, unless otherwise noted and discussed due to historical agreements from the past.

g. Membership recruitment of non-Tandon School of Engineering students.

h. Programs for the exclusive benefit of, or targeted to, non-Tandon School of Engineering students.

i. Activities considered high risk/liability by the Student Council and/or Office of Student Activities & Resource Center.

j. Scholarships or scholarship donations.

k. Programs which are not in compliance with accessibility standards, including, but not limited to the Americans with Disabilities Act and NYU's Policy on Website Accessibility.

l. Programs that discriminate attendance based on race, gender and/or gender identity or expression, color, creed, religion, age, national origin, ethnicity, disability, veteran or military status, sex, sexual orientation, pregnancy, genetic information, marital status, citizenship status, or on any other legally prohibited basis, with the exception of those groups that have an exemption under Title IX.

m. Non-advertised programs occurring during an organization's regularly scheduled meeting(s).

n. Salaries, fees, honorariums, etc. for instructors, tutors, or School of Engineering faculty.

o. Events held off-campus without University supervision or direction.
CLUB PURCHASING GUIDELINES

Student Reimbursements
For all reimbursements and payments, certain documents are required for accounting and auditing purposes. Pre-arrangements for large expenditures or questionable expenditures should be processed with the Director of the Office of Student Activities & Resource Center.

Reimbursement Process
● The student who made the purchase must fill out the Tandon OSARC Student Club Reimbursement Form available on NYU Engage.
  ○ The student must attach valid receipts and/or documentation (itemized, in English, clear photo or scan, in acceptable file format) to avoid payment delays.
● Once reviewed and approved in NYU Engage, a Graduate Assistant will then process the reimbursement in Albert SIS.
● After the payment has been approved by an OSARC professional staff member, students will receive their reimbursement in one of the following ways:
  ○ If the student is enrolled in Direct Deposit, they will be paid to their Bursar Electronic Suite (eSuite) Direct Deposit account. The student will be notified via automated email once their reimbursement has been approved and will be able to track it in Albert SIS.
  ○ If the student is not enrolled in direct deposit, they will be paid via check. The check will be mailed to the "Mailing Address" listed in Albert SIS. If the student has not created a Mailing Address, the check will default to the Permanent Address.
  ○ Students also have the option of picking up a cash reimbursement if the total amount of their request is $300 or less. The student must select the cash option when completing the reimbursement form in NYU Engage.
    ● The student will be notified via automated email that their payment is approved and ready for pickup. They can pick up cash at any of the locations listed below. Please make sure to bring a PHOTO ID.
      ● Brooklyn StudentLink Center: 5 MetroTech Center, Suite 201
      ● Manhattan StudentLink Center: 383 Lafayette Street, 1st Floor

Payments through OSARC
For payments to external vendors or individuals via check OR large purchases, please make an appointment with your Graduate Assistant to review the expense and the payment process.

Credit Card Payments (vendors ONLY - under $2500)
● Any clubs making payments to external vendors or individuals via credit card must contact their Graduate Assistant to make an appointment to visit the OSARC office to use the office purchasing card. It is recommended that clubs make appointments to use the credit card 1 week in advance of their event to ensure availability. Permission will not be granted for club officers to take the OSARC purchasing card off campus to make payments in-person - all payments must be made via phone or internet.

Checks (vendors and individuals – under $1000)
● Any clubs making payments to external vendors or individuals via check must contact their Graduate Assistant to start the vendor enrollment process. The vendor enrollment process takes approximately 1-2 weeks based on the response time of the vendor. After vendor
enrollment approval is granted, a check will be requested and is usually mailed 4-6 weeks after the check request is approved.

**Purchase Orders (vendors and individuals – over $1000)**
- Club must meet with an OSARC professional staff member to review the process. A purchase order must be created, which entails approving the vendor with NYU (if not already an approved vendor), using a contract or price quote to create the PO, and submitting an invoice for payment.
- Clubs must request a PO at least 30 days before their event.
- Payment via PO takes at least 60 days after the date of the event.

**Eventbrite**
For events that require a co-pay or ticket purchase, clubs must include this in their Engage event request and separately email their Graduate Assistant. This email should include: why you need attendees to pay rather than covering costs with club funding, cost breakdown, an event description, ticket cost, any instructions for participants, and timeline for sales. If approved, clubs are required to use the official OSARC Eventbrite account - clubs are not permitted to use personal Eventbrite accounts. To do so, clubs will be required to meet with their Graduate Assistant at least two (2) weeks prior to the start of ticket sales to create their Eventbrite page and any changes needed after that must be approved by the Graduate Assistant.

**Club Purchasing Card**
University purchasing cards are issued on an invitation-only basis to eligible clubs that spend more than $2500 annually. The purchasing card will be in the name of the club and may carry over from year to year depending on club spending. Club presidents and treasurers are designated as the primary card holders and MUST complete training at the beginning of their term in order to be able to use the card. If you believe your club is eligible for a University purchasing card and you have not been invited into the program, please contact your Graduate Assistant.

**Purchasing Card Reconciliation Process**
- Club presidents and treasurers are responsible for maintaining their card. They will check it out from OSARC at the beginning of the academic year and must return it at the end of the year. They are responsible for checking the card in and out to club members and tracking it on a log that is shared (via Google Drive) with their GA.
- Once a purchase is made, the purchaser should email a photo or scan of the receipt along with a description of the purchase and the event name and date it was made for to the club president and treasurer.
- Within 3 business days, the president or treasurer must reconcile the expense by:
  - Uploading ONE supporting document that contains the receipt and the approved event page from NYU Engage
  - Entering an Expense Description that contains the source of the funding (initial allocation, supplemental allocation, or revenue fund) AND the event name and date (e.g. INITIAL – ASCE General Body Mtg – 9/4/17)
- The club’s Graduate Assistant will review the expense and receipt, enter the correct chartfield number, and track the expense in NYU Engage.
- Once the Graduate Assistant has reviewed the expense, an OSARC professional staff member will complete the final review process.

**Purchasing Card Policies**
- All presidents and treasurers must complete the OSARC purchasing card training in order to use the club purchasing card.
• All purchases must follow the OSARC initial, supplemental, and revenue fund spending guidelines. Any purchases made in violation of the spending guidelines will be denied and the club/individual must reimburse OSARC from their revenue fund or personal funds.
• All receipts must be uploaded within 3 business days. Failure to reconcile expenses within 3 business days may result in the loss of the card.
• The card limit will be set to the club’s initial allocation for the semester, plus any supplemental funding that is granted. Club officers are responsible for communicating with their GA if they need money from their revenue account added to the card. There is also a transaction limit for each club. If club members need to make a purchase larger than this limit, please contact your Graduate Assistant.
• Club leaders should notify OSARC staff members immediately in the case of a denied transaction.
• Club leaders should notify OSARC staff members immediately in the case of a lost/stolen card. A card that is lost may not be replaced.
• Club leaders should notify OSARC staff members immediately in the case that the president or treasurer has stepped down, been removed, and/or been replaced.
• OSARC reserves the right to alter the card limit and/or revoke the purchasing card at any time for any reason. The club purchasing card is a privilege, not a right, and should be treated as such.