



# Club Budget Policy

## Policy Information

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**Category: Finance**

**Internal Control Program Approved: April 19, 2022**

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The Student Association prepares an annual budget according to the processes set forth in the SA By-Laws and SUNY policies. Every expenditure by SA or an SA recognized club is pursuant to an approved budgetary allocation. Estimated revenues and estimated expenditures must be based on realistic projections. As used in this Policy, “Budget” for clubs means the amount of money allocated by SA for the club at the beginning of the relevant fiscal year for that year.

SA uses a system of budgetary accounts to codify the budget. The breakdown can be found within SA’s chart of accounts and line descriptions. Each budget is for the fiscal year beginning on August 1 and ending on July 31 of the following year. Once the proposed budget has been prepared, it must be formally approved or adopted in accordance with the SA By-Laws, UB and SUNY policies.

## Prior Year Budget Activity and the Effect it has on the Current Year’s Budget

Any encumbrances outstanding at the end of the fiscal year (July 31) will be voided prior to fiscal year end and entered into the new fiscal year’s budget. They may be voided prior to 7/31 if it is not reasonably possible for the check to be processed in the last check run of the fiscal year.

## Club Budget Tier System

The Student Association, in its efforts to maintain consistency from year to year, categorizes clubs into tiers. Each tier has requirements that organizations must meet to be eligible for the funding sources that the tier provides. Funds will be budgeted and disbursed based on approved viewpoint neutral policies and procedures. Consistent with the mandates of SA’s By-Laws, SA is strictly prohibited from considering the viewpoint(s) held and/or expressed by any club, its officers, or its members when making club budget determinations. No club should expect their sole funding to come from the Student Activity Fee.

The term “active members” refers to the number of voting members a club has in accordance with their approved constitution. The amount of active members in a club is considered for the purpose of determining the level of undergraduate UB student participation and attendance at the club’s events and activities and the consequent objective financial needs of that club.

### Tier I

Clubs who are assigned to this tier are generally new clubs and clubs who did not apply for a budget during the spring’s budgetary process. Clubs within this tier receive a flat budget amount of \$250. Budgets are only available to new clubs once they have completed all recognition requirements as stated by the New Club Recognition Policy. Clubs within this tier must meet the requirements as set forth by the Annual Registration and Requirements for Recognition Policy.

## Tier II

Clubs who are assigned to this tier have requested a budget and have been approved to have a budget of \$251 - \$2,499. Clubs in this tier must complete the following requirements:

1. Be a recognized SA club.
2. Have completed 4 Club Meetings and/or Events for the academic year.
3. Have at least 20 active members.

## Tier III

Clubs who are assigned to this tier have requested a budget and have been approved to have a budget of \$2,500 - \$4,999. Clubs in this tier must complete the following requirements:

1. Be a recognized SA club.
2. Have completed 5 Club Meetings and/or Events for the academic year.
3. Have at least 20 active members.

## Tier IV

Clubs who are assigned to this tier have requested a budget and have been approved to have a budget of \$5,000 - \$9,999. Clubs in this tier must complete the following requirements:

1. Be a recognized SA Club.
2. Have completed 6 Club Meetings and/or Events for the academic year.
3. Have at least 25 active members.

## Tier V

Clubs who are assigned to this tier have requested a budget and have been approved to have a budget of \$10,000 - \$19,999. Clubs in this tier must complete the following requirements:

1. Be a recognized SA Club.
2. Have completed 7 Club Meetings and/or Events for the academic year.
3. Have at least 25 active members.

## Tier VI

Clubs who are assigned to this tier have requested a budget and have been approved to have a budget of \$20,000 - \$50,000. Clubs in this tier must complete the following requirements:

1. Be a recognized SA Club.
2. Have completed 10 Club Meetings and/or Events for the academic year.
3. Have at least 30 active members.

## Budget Requests Packets

During the spring semester of each academic year, clubs can submit budget requests through the SA website. Any club that does not submit a budget request by the SA Treasurer's set deadline will receive a \$250.00 budget.

## General Budget Limitations

There are certain limitations that automatically apply to requested budget amounts before any other factors are applied. They are as follows:

1. The maximum budget for any club is \$50,000.
2. The amount of a club's budget request will be reduced to the lower of: (a) the total amount requested by the club or (b) the total itemized expenditures in their budget packet.
3. A club cannot receive more than the maximum budget allocated for their eligible Tier.
4. Clubs must meet the requirements for the Tier they have requested a budget for to change their current Tier. Clubs which do not meet the requirements for their respective Tier will

be eligible for, at most, funding in the Tier that they did complete the requirements for. The calculation of tier requirements will include club activities from the first day of the fall semester up to Monday of the third week in April of the current academic year.

5. Clubs can only move up one Tier at a time.

Club requests must be allowable under SUNY policy to be allocated. There are also other limitations which apply to calculated budget allocations after all other factors are applied. They are as follows:

1. The total funds allocated to all clubs in total may not exceed the total available amount set by the SA Treasurer prior to club budget considerations.
2. A percentage reduction to the proposed budget of all clubs may be applied if necessary to reduce the total amount allocated to clubs. Tiers one, two and three clubs shall not receive a percentage reduction. Tier 6 clubs will receive a percentage reduction that is double the percentage of tier 4 clubs with tier 5 clubs' percentage being halfway between the two.

## Historical Data

The Student Association considers the then-current academic year and then-previous academic year when determining budgets for clubs with historical data.

1. For clubs in tiers 5 and 6 requesting a budget increase only: No club shall receive a budget more than 5% higher than the amount they spent during the then-previous academic year or the year before that, whichever is greater.
2. For clubs without historical data (i.e., new clubs), the total budget allocation shall not exceed \$1,500.
3. If a club has been found to have committed 3 or more policy violations in the then-current academic year, 10% shall be removed per violation (starting with the third violation) from the final proposed budget of that club.

## Expenditures

All expenditures involved in the calculation of a club's total budget numerical request must be itemized. If the expenditures are not itemized and detailed, money will not be provided for them. Itemization involves explaining what the expenditure is and listing out the specific items and their individual costs needed for that expenditure. Numerical ranges and descriptions such as "Other Expenses" are not allowed. The Student Association will not allocate as part of a club's budget request funds for the following expenditures:

1. Food for general body meetings; this excludes banquets and similar events.
2. Merchandise as defined by the Ticketing and Merchandise Policy.
3. Gift Cards.
4. Tangible items to giveaway.
5. Individual non-transferrable memberships to outside organizations.
6. Publications or Digital Media.
7. Separated hotel and transportation book-ins for Artists. Any fee paid for a performing artist should be inclusive of the vendor paying for the artist's accommodations and travel.
8. Expenditures that violate any applicable policy or law, are not reasonably feasible, are not covered by SA's existing insurance, or could result in unreasonable liability and/or safety risk to the club, SA, and/or UB.
9. If reasonably equivalent goods or services can be provided by another vendor at a lower price, funding shall not be provided for the excess amount.

## Events

For events that are expected to cost over \$1,000, the following are required:

1. Estimated attendance (broken down by undergraduate UB students, non-undergraduate students of UB, and outside public).
2. If a repeat event, information on past attendance with numerical data.

If the total cost of the event (excluding conferences and competitions) divided by undergraduate UB student attendance is more than an individual student's activity fee for a semester, then expenses will be capped at the amount of an individual student's semesterly activity fee multiplied by the number of undergraduate students included in a reasonable attendance estimate based upon past attendance.

## Appeals

Clubs may appeal budget determinations within 10 days of when the club is informed of the budget determination by email. SA shall provide notice of the budget determination to the President and Treasurer of the club, based on the last updated information provided by the club to SA using required procedures. During the UB spring and fall semesters, any budget appeals shall be handled by the Senate. During winter and summer sessions, budget appeals shall be handled by the Executive Committee. Any appeals made by clubs may only be based on procedural error, inaccurate application of the above criteria or math pertaining to the relevant club, or violation of law. A club may only appeal its own budget, not that of any other club. Appeals shall be decided within 45 days of when they are submitted. The Executive Committee may decide any such appeal following the last day of classes of the spring semester, if the Senate has not rendered a decision on it. If a club is successful in its appeal, that shall not result in a reduction in the funding of any other club.