



Club Budget Policy

Policy Information

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Category: Finance

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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.

For more information on the budgetary process, see Article VII of the SA By-Laws.

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. Clubs must meet a tier’s requirements to be eligible to receive any amount of funding that falls within such tier. The calculation of tier requirements will include club activities from the first day of the fall semester up to the third Monday in April of the academic year. 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” of a club refers to the number of UB students who have attended at least three of that club’s Meetings and/or Events on or between the first day of the fall semester and the third Monday in April of the academic year. How many Meetings and Events an individual has attended and how many Meetings and Events a club has held may be tallied periodically throughout the academic year. Without limitation, SA may rely on the information entered by the club into UBLinked for purposes of determining how many active members are in the club, how many Events and Meetings the club held, and any other data that is relevant under this policy. 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.

As used in this Policy, the terms "Meetings" and "Events" refers only to approved club events on UBLinked.

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 10 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 15 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 20 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.
5. Clubs may only move up to the higher of the following:
 - a. The club's assigned tier in the then-current academic year, plus one; or
 - b. The tier to which the club was assigned in the then-previous academic year, so long as the club did not drop tier(s) due to violations.
6. The SA Treasurer may (but is not required to) require all clubs to use a budget request form that caps a club's itemized requests at the maximum amount allowed under number 5 above; for clubs in the highest tier, the maximum amount of itemized request under such form shall be the maximum amount allowed for such tier.
7. The SA Treasurer may round any numbers to the nearest dollar, so long as rounding is handled consistently for all clubs.
8. Historical data of any derecognized club shall not be used in any subsequent calculation of club budgets.
9. Club requests must be allowable under SUNY policy to be allocated.

Percentage Reductions

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.
3. If calculation of the percentage reduction under number 2 above would result in the proposed budget of Tier 6 clubs being reduced by more than 50%, then the following percentage reduction shall instead be applied: Tiers 3, 4, 5, and 6 will each receive an equal percentage reduction, and Tiers 1 and 2 will not receive a percentage reduction.

References to tiers under this subheading shall refer to the proposed tier the club would be in for the upcoming budget year after applying all other criteria under this policy, except for number 2 under Historical Data.

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 increase that would result in the club's budget being more than 5% higher than the amount they spent during the then-current academic year (through the third Monday in April) or the entire academic year before that, whichever is greater.

2. If a club has been found to have committed 3 or more policy violations in the then-current fiscal year, 10% shall be removed per violation (starting with the third violation) from the final proposed budget of that club.
 - a. For clarification, if a club is found to have committed a violation after the club's budget for the following fiscal year is determined but before the start of the following fiscal year, that violation shall still count in the described calculation, and any resulting reduction to the club's budget shall be made when reasonably possible.
 - b. Money removed due to club violation(s) shall be used to fund additional monies granted to any clubs that win their budget appeals, and if any amount is left over, such amount shall be added to the SA budget line for Newly Recognized Club Funding and Club Appeals.

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. Any food other than for up to 2 events per academic year; if the club requests more than that, only the highest allowable food requests may be approved; however, if a particular food is so integral to the club as to be part of both the club's name and purpose, then the foregoing limitation shall not apply with respect to such food.
2. Merchandise as defined by the Ticketing and Merchandise Policy, except for apparel.
3. Gift Cards.
4. Tangible items to give away, except for apparel.
5. Individual non-transferrable memberships to outside organizations.
6. Expenditures related to any aspect of the production or distribution of publications or digital media.
7. Separated hotel and transportation bookings for Artists, because 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.
10. Items and services that SA provides to SA clubs at no cost.

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. Without limitation, SA may rely on information from the UB Ticket Office related

to ticket sales and information that the club has entered into UBLinked when making such determination.

Appeals

Clubs may appeal funding determinations within 10 days of when the club is informed of the determination by email. SA shall provide notice of the determination to the President and Treasurer of the club (as listed on SA's records). 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. Club funding appeals shall be decided by the Elections and Compliance Chairperson. If a club is successful in its appeal, that shall not result in a reduction in the funding of any other club.