SGA

FINANCIAL GUIDELINES

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1. PURPOSE
   a. Rationale
      The purpose of these guidelines shall be to govern the distribution of funds by the
      Student Government Association (SGA) of Purdue University Fort Wayne. This
      document shall be binding to all of SGA.

   b. Viewpoint Neutral
      All financial decisions made by SGA and its members shall be viewpoint neutral, and
      this position shall reflect, but not be limited to, the policies included in the Non-
      discrimination clause as stated in the Purdue Fort Wayne Code of Student Rights,
      Responsibilities, and Conduct in Part I, Section A, Items 3 and 4.

2. ADHERENCE TO UNIVERSITY GUIDELINES AND PROCEDURES
   a. Student Activity Fee Manual
      All expenditures of SGA shall be subject to the pertinent guidelines and rules of the
      University, first and foremost, the guidelines contained in the Student Activity Fee
      Manual.

   b. Business Office Procedures
      No expenditure of SGA funds may be allowed unless the procedures and paperwork
      required by the Purdue Fort Wayne Business Office and these SGA Financial
      Guidelines are handled accurately in accordance with the rules and processes
      stipulated in this document or with any other relevant University document or policy.

   c. Supplemental Use
      This document is intended solely as a supplement to other University manuals and shall
      not take precedence in any case where there is a conflict with other University
      Guidelines. This document is meant only to outline the proper procedures for funding
      that SGA has adopted in governing the distribution of funds.

3. DEFINITIONS
   a. Allocations Committee: The committee that hears annual budget requests and
      presents a budget proposal to the Student Senate for consideration.
   b. Event: A program or activity that is open to the student body.
   c. Fiscal Year: The period from July 1 through June 30 of the following year, which is
      used for accounting purposes.
   d. Funding Probation: A condition whereby a student, student organization or other
      University entity is prohibited from receiving funding from SGA as a result of violating an
      SGA funding policy.
e. **SGA Funds**: Any and all funds that are allocated to any branch of SGA through the annual Allocations budget process.

f. **Signature Authority**: The authority to authorize expenditures from an SGA account.

g. **Student Organization**: A student group that is currently chartered by SGA and recognized by the Purdue Fort Wayne Student Life office. Student organizations are not eligible to receive budget lines through the annual allocations process.

h. **Ways and Means Committee**: The Student Senate committee which oversees the financial aspects of the Student Senate.

i. **Club Sports**: Any organization that is qualified to be labeled as such by the office of Student Life and Leadership.

j. **Regular Operations**: Anything that qualifies for meeting requirements as stated in the organization’s constitution, or other requirements necessary for the organization’s recognition to exist or function. These meetings could be, but not limited to; official club business meetings, club sport practices, and induction ceremonies.

k. **Off Campus Events**: Events that take place outside of Purdue Fort Wayne owned facilities that are still within the Allen County territory.

4. **ALLOCATIONS COMMITTEE**

   a. **Purpose**

   The Allocations Committee shall conduct budget hearings and prepare and present a balanced annual budget proposal to the Student Senate for consideration. The committee shall follow the guidelines contained in these Financial Guidelines and use the best interest of the student body in making its recommendations to the Student Senate.

   b. **Membership**

   i. The voting membership of the Allocations Committee shall consist of: the Vice President of Finance; the Chair of the Senate Ways and Means Committee or a Senator serving on the Ways and Means Committee nominated by the Vice President of Legislation and confirmed by the Student Senate, if the Chair is unable or unwilling to serve; two additional Student Senator recommended by the Vice President of Legislation, nominated by the Student Body President, and confirmed by the Student Senate; and two Purdue Fort Wayne students, and one Indiana University Fort Wayne student, who are not members or employees of SGA, nominated by the Student Body President and confirmed by the Student Senate.

   ii. In the event a voting member of the Allocations Committee fails to serve his or her obligations, a replacement may be named and confirmed according to the procedure in Section 4.b.i.
iii. The Student Government Coordinator and the Business Manager for Student Affairs and Student Activities shall serve as non-voting ex officio members of the Allocations Committee.

iv. The Vice President of Finance shall chair the Allocations Committee. The Chair of the Senate Ways and Means Committee, or a member of that Committee in the absence of the Chair, shall serve as Vice Chair of the Allocations Committee and shall assume the duties of the Chair in the absence of the Chair or in the Chair’s failure to perform any respective duties. If the Chair of the Senate Ways and Means Committee is unable or unwilling to serve as Vice Chair of the Allocations Committee, a different member of the Allocations Committee shall be appointed Vice Chair by the Vice President of Finance.

c. Timeline

i. The Vice President of Finance shall establish and publish the official Allocations Committee Timeline by the end of normal business hours of the first week of the spring semester, unless circumstances beyond the control of the Vice President of Finance limit him or her from reasonably doing so.

ii. The official Allocations Committee Timeline shall include the following activities and deadlines:

1. Date by which all nominated voting committee members shall be approved by the Student Senate
2. Week during which the first official meeting of the Allocations Committee is to occur
3. Initiation of electronic budget request submissions from organizations eligible to receive funding through the annual allocations process
4. Date by which all budget requests must be received by the Vice President of Finance for consideration by the Allocations Committee
5. Period of time for budget presentations to occur
6. Period of time for budget deliberations to occur
7. Deadline for final budget recommendation to be approved by the Allocations Committee

iii. Changes to the official Allocations Committee Timeline may be made as needed by the Vice President of Finance or a majority vote of the Allocations Committee.

iv. The Vice President of Finance shall make every reasonable effort to present the balanced line-item budget recommendation prepared by the Allocations Committee to the Student Senate before the SGA elections are to occur.

v. The Allocations Committee shall automatically disband one day following the Chancellor’s final approval of the annual budget.
d. Responsibilities
   i. The Vice President of Finance shall establish rules of order for Allocations Committee meetings, hearings, and deliberations. These rules shall not violate the fundamental principles of a democratically-operated deliberative body.
   ii. The Vice President of Finance shall regularly communicate with all members of the Allocations Committee to alert them of upcoming meetings, schedule changes, deadlines, and any other information relevant to the proper functioning of the Allocations Committee.
   iii. The Vice President of Finance shall make every reasonable effort to ensure that the schedules of Allocations Committee members and presenters are taken into careful consideration when establishing meeting times, dates, and locations.
   iv. The Allocations Committee shall maintain records of all Allocations Committee hearings and meetings, except for the committee’s internal deliberations of the budget requests. Records of the committee shall become part of the public record of SGA immediately upon the disbanding of the committee.

e. Budget Requests and Presentations
   i. The Allocations Committee shall hold public budget hearings at which petitioners for student activity fee funds will make presentations explaining their budget requests and answer questions from the committee members.
   ii. Petitioners are entitled up to fifteen (15) minutes of presentation time followed immediately by up to ten (10) minutes of time in which Allocations Committee members may ask questions of the presenters.
   iii. Requests by petitioners to have more than twenty minutes of presentation time may be granted by the Vice President of Finance on a case-by-case basis.

f. SGA Budget Requests
   i. The Student Body President and the Vice President of Finance shall determine the budget request for the SGA office and the Student Body President will present this budget request to the Allocations Committee.
   ii. The Vice President of Legislation shall determine the budget request for the Student Senate and present the budget request to the Allocations Committee.

g. Deliberations
   i. Deliberations shall be closed to the public.
   ii. During the deliberation process, Allocations Committee members may begin to form recommendations for each of the requested line items based on the total budget and the information provided during public budget hearings.
   iii. After deliberations have ended and the Allocations Committee has agreed on a recommended budget, the Vice President of Finance shall present the budget recommendation at the next meeting of the Student Senate.
h. Budget Approval
   i. The Student Senate may make any adjustments to the budget submitted by the
      Allocations Committee judged to be in the best interests of the student body.
      Upon Student Senate approval, by a majority vote, the budget shall be forwarded
      to the Student Body President for consideration.
   ii. If the budget is vetoed by the Student Body President, it will return to the Student
      Senate for reconsideration. The Senate may override the veto with a 2/3 majority
      vote of members present or send a revised budget to the Student Body President
      for consideration.
   iii. Upon approval by the Student Senate and the Student Body President or a
      Student Senate veto override, the budget shall be submitted to the Vice
      Chancellor for Student Affairs (VCSA) for review and approval. If the VCSA
      disagrees with the budget as presented, a meeting will be held between the
      VCSA and the SGA Executive Officers to resolve the differences, and upon
      agreement, the proposed budget shall be forwarded to the Chancellor and Vice
      Chancellor for Financial Affairs for review.

i. Exceptions
   In special cases resulting from Purdue Fort Wayne contracts, the Allocations Committee
   and SGA may be required to allocate funds for certain organizations, events, or other
   purposes.

5. SENATE DISCRETIONARY FUND
   a. Funding Available
      i. The Senate Discretionary Fund shall be allocated through the annual budgeting
         process in accordance with these guidelines.
      ii. Funding shall be made available to recognized student organizations for events
         or activities open to the entire student body, and for other purposes that seek to
         benefit the student body and advance the goals and interests of SGA. Only
         student officers may submit a request for event funding, and all other funding
         only if officially sponsored by a recognized student organization or the student’s
         enrolled Purdue Fort Wayne academic department. Faculty and staff affiliated
         with a recognized student organization may not request funding on behalf of a
         student organization.
         1. Individual student(s) shall provide proof of sponsorship in the form of a
            signed letter
      iii. Requests for funding from the Senate Discretionary Fund are not guaranteed and
           should not be assumed to be. Payments for approved activities or events are not
           guaranteed to be available before the start of the activity or event.

b. Event Funding Criteria
i. Requests for Student Senate event funding shall include a detailed line-item breakdown of expenses and potential income, the logistics of the event, the purpose for holding the event, the reason why SGA should be a financial partner in the event, the date, time, and location of the event, and any other information that enhances the detailed understanding of the event.

ii. Requests for event funding must be submitted no later than 21 calendar days before the event is to occur. In the event of extraordinary circumstances, the requester may petition the Ways and Means Committee to bypass the submission deadline by providing substantiation of circumstances, which shall include both of the following:
   1. A letter from any Dean or Chancellor;
   2. Documentation of extraordinary circumstances.

iii. Permissible activities shall include, but not be limited to: lectures, awareness events, musical performances, cultural events, formal or informal meals, fundraisers, ceremonies, carnival-style attractions, debates, public hearings, rallies, and conventions. Student Senate funds shall not be used for the regular operations or business of student organizations.

iv. Student Senate funds may be used for food, disposable wares, speaking fees, entertainment costs, venue fees, security, rentals, and travel costs for entertainers, lecturers, and/or other event-focused guests coming to the University, and other goods or services deemed appropriate.

v. Any event funded by the Student Senate shall be reasonably open and accessible to all current Purdue Fort Wayne students.

c. Off Campus Funding

i. Requests for Student Senate funding that are off campus events may be requested through procedures similar to those for event funding. These requests shall include detailed line-item breakdown of expenses and income, the purpose of the request, the reason why SGA should be a financial partner in the endeavor, and any other information that enhances the detailed understanding of the request.

ii. Requests for event funding must be submitted no later than 21 calendar days before the event is to occur. In the event of extraordinary circumstances, the requester may petition the Ways and Means Committee to bypass the submission deadline by providing substantiation of circumstances, which shall include both of the following:
   1. A letter from any Dean or Chancellor;
   2. Documentation of extraordinary circumstances.

iii. Permissible activities shall include, but not limited to, any activity listed in Section 5, Sub-section B, line item iii. As well as for the building and assemblage of projects for competitions either inside or outside the Allen County territory, as long as the building and assemblage take place within the Allen County territory.

d. All Other Funding
i. Requests for Student Senate funding not designated for events may be requested through procedures similar to those for event funding. These requests shall include detailed line-item breakdown of expenses and income, the purpose of the request, the reason why SGA should be a financial partner in the endeavor, and any other information that enhances the detailed understanding of the request.

ii. Requests for endeavors not considered events shall be submitted no later than 21 calendar days before the funds are needed. In the event of extraordinary circumstances, the requester may petition the Ways and Means Committee to bypass the submission deadline by providing substantiation of circumstances, which shall include both of the following:
   1. A letter from any Dean or Chancellor;
   2. Documentation of extraordinary circumstances.

iii. These requests shall be subject to the funding rules outlined in the Student Activity Fee manual and the discretion of the Student Senate.

e. Bill Process
   i. All requests for Senate funding shall be handled in the form of a bill.
   ii. All requests for Senate funding shall be submitted electronically to the Vice President of Legislation. The Vice President of Legislation shall deny any submitted request that does not meet these Financial Guidelines.
   iii. Only requests submitted by recognized Purdue Fort Wayne student organizations or individuals sponsored by a recognized student organization or academic department shall be considered for funding by the Student Senate.
   iv. Requests must be presented using standard forms and templates provided in electronic form on the SGA website.
   v. All standard forms and templates used for funding requests shall be established, amended, and managed by the Vice President of Finance.
   vi. After receipt of a funding request, the Vice President of Legislation shall ensure that all funding rules and criteria have been followed by the requestor. If the request is found to be incomplete or in violation of SGA or Purdue Fort Wayne guidelines, the Vice President of Legislation shall contact the requestor and explain the changes and resubmission will be necessary for consideration. Once a funding request has been checked over by the Vice President of Legislation and found to be in accordance with all SGA guidelines, the request shall be referred to the Senate Ways and Means Committee for consideration, upon which time the bill will move through the legislative process in accordance with the Student Senate Bylaws and any other legislation pertinent to the funding request process.
vii. Once a bill has been approved by the Student Senate and the Student Body President, the Vice President of Finance shall manage the paperwork and procedures necessary for the proper payment of approved funds.

f. Obligations of Recipients
   i. The Vice President of Finance shall be responsible for establishing, amending, and managing standard forms and procedures to ensure that all obligations of Senate funding recipients are being met in a reasonable and timely manner.
   ii. Obligations of Recipients of Funds for an Event
       1. Any revenue generated from an SGA sponsored event must be returned to SGA, up to the amount allocated.
       2. Once funds have been allocated, those funds can only be used for the specified items that were designated in the approved bill.
       3. To acknowledge SGA sponsorship, organizations that have received funding from the Student Senate shall advertise the SGA sponsorship of the event through the use of the SGA or other approved means.
       4. The student organization must provide detailed receipts of income and expenses, attendance figures, and any other relevant follow-up information to SGA no later than ten (10) business days after the SGA sponsored event has concluded or within ten (10) business days of receipt of the funding check if not received before the event.
       5. The student organization must return any unspent SGA funds to SGA no later than ten (10) business days after the SGA sponsored event has concluded or within ten (10) business days of receipt of the funding check if not received before the event. The organization must also contact the Business Manager for Student Affairs to complete the process.

g. Funding Limitations
   i. Funding Probation
       1. Individual students and student organizations may be placed on funding probation for misuse of SGA funds, violations of SGA or Purdue Fort Wayne policies or local, state, or federal laws, failure to comply with necessary funding processes or procedures or for any actions or behaviors that would cause significant negative impacts on SGA or the student body.
       2. The Vice President of Finance, in consultation with the Student Government Coordinator and Business Manager for Student Affairs and Student Activities, shall have the power to place individual students and student organizations on funding probation and determine the length of time and terms of the probation.
3. Individuals and organizations on funding probation shall receive no funding from any SGA accounts.
4. Funding probation shall last no longer than two calendar years.
5. Any appeal of funding probation can be made by the individual or organization to the Senate Ways and Means Committee. If the Ways and Means Committee’s decision is unacceptable to the appellant or the Vice President of Finance, the case may be appealed to the SGA Judicial Court. If the Judicial Court’s decision is unacceptable to either party, the case may be appealed to the Campus Appeals Board for final review and decision.

ii. Probation Guidelines
1. Recipients of SGA funds shall be allowed reasonable flexibility within the scope of these guidelines provided they operate in good faith when utilizing SGA funds.
2. Any student organization that hosts an SGA-funded event that is not reasonably open to all current Purdue Fort Wayne students shall be placed on funding probation for six (6) months.
3. Any student organization that fails to return any revenue generated from an SGA sponsored event back to SGA up to the total amount of funding allocated shall be placed on funding probation for the longer of six (6) months or until the revenue generated is returned to SGA, up to two (2) calendar years.
4. Any student or student organization that fails to use SGA funds for the specified items designated in the approved bill may be placed on funding probation for no less than two (2) months, but no more than twelve (12) months, depending on the severity as determined by the Vice President of Finance.
5. Any student organization that fails to acknowledge SGA sponsorship through the use of the SGA logo or any other approved means shall be placed on funding probation for no less than three (3) months, but no more than nine (9) months, depending on the frequency of the violation.
6. Any student or student organization that fails to provide detailed receipts of income and expenses to SGA no later than ten (10) business days after the event or return date of a trip or within ten (10) days upon receiving the funding check if funds are not received before the event or trip shall be placed on funding probation for no less than two (2) months, but no more than twelve (12) months, depending on the severity as determined by the Vice President of Finance.
7. Any student or student organization that violates any University policies or applicable laws while hosting an SGA sponsored event or while on an
SGA sponsored trip shall be placed on funding probation for two (2) calendar years.

6. SGA OFFICE BUDGET
   a. Budget Line Items
      i. The Vice President of Finance and Student Government Coordinator shall be responsible for ensuring that the SGA office budget is balanced and as current as reasonably possible.
      ii. Money may be moved between line items in the SGA office budget to allow for the proper and reasonable operations of the SGA office.
          1. Money movements shall be conducted only after a formal vote in which all Executive Officers vote in favor of the money movement.
          2. Money shall not be moved to increase the wages or overall compensation of any member of the Executive Branch.
          3. Money movements shall not violate the overall intent of the SGA office budget.
          4. The Vice President of Finance and Student Government Coordinator shall keep official records of all line item movements within the SGA office budget.
   b. Signature Authority
      i. Executive Officer signature authority is only valid internally to SGA.
      ii. Student Government Coordinator signature authority shall be valid to Purdue Fort Wayne.
      iii. Misuse of this signature authority is grounds for impeachment from any SGA office.
      iv. The Student Government Coordinator must sign off on all expenditures from SGA accounts.
   c. Oversight
      Expenses using SGA funds in excess of $25,000 shall be subject to approval by a simple majority vote of the Student Senate.

7. JUDICIAL COURT DISCRETIONARY FUND
   a. Allowable Expenses
      The SGA Judicial Court shall have the power to spend its funds within the limitations outlined in SGA binding documents and the Purdue Fort Wayne Student Activity Fee Manual.
   b. Process
      i. The Judicial Court shall make purchases for goods and services in accordance with the rules and procedures outlined in the Judicial Court Bylaws.
ii. The Student Government Coordinator shall sign off on all spending proposed by the Judicial Court.

iii. If the funds allocated to the Judicial Court through the annual budget process are insufficient, the Court may petition the Student Senate for additional funds through the same manner as recognized student organizations.

8. **FUNDING CAPS**
   a. Funding Caps
      i. Student organizations may receive up to $7,500 from SGA per fiscal year. This cap shall exclude amounts granted to individual travel awards sponsored by a recognized student organization. This cap shall exclude amounts granted to recognized student organizations if SGA is a co-sponsor.
      
      ii. Requests for funding by student organizations that have already met funding caps for the fiscal year shall be automatically rejected by the Vice President of Legislation.
      
      iii. Exceptions to the cap shall be accepted to the Student Senate upon signature of approval from the Chief Student Affairs Officer. Exceptions to the cap must show exceptional interest to the student body. Exceptional interests can be characterized by, but not limited to; high attendance of over 500 Purdue Fort Wayne students or events that meet an unmet need of the student body. Exceptions to the cap must be approved by a ¾ vote of the Student Senate.

9. **FINANCIAL RECORDS**
   a. Record Maintenance
      The Vice President of Finance and Student Government Coordinator, along with other necessary University officials, shall manage all financial records for SGA.
   
   b. Public Information
      Official requests for public information will be referred by SGA officials to the Vice Chancellor for Financial Affairs or the Purdue Public Records Office for further action.

10. **AMENDMENTS**
    a. This document may be amended via a 3/5 vote of the total Student Senate membership during a regularly scheduled Student Senate meeting. Amendments shall take effect upon receiving approval by the Student Body President or veto override in accordance with the process outlined in the SGA Constitution.
    
    b. No amendments shall be made that significantly eliminate the rights or flexibilities of any branch of SGA.