

Student Organization Funding Handbook

2022-2023

University of
Wisconsin-Eau Claire
Student Senate
Student Organizations
Commission

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What are Segregated Fees?

Segregated university fees (SUF) are charges, in addition to instructional fees, assessed to all students for student services, activities, programs and facilities that support the mission of University of Wisconsin System institutions. There are two categories of SUF, as follows:

(1) *Allocable*. Allocable SUF are those SUF that provide substantial support for campus student activities and services as outlined in Section I.(B)(6)(a) and that are allocated by students, in consultation with the chancellor and subject to the final confirmation of the Board of Regents, in accordance with [s. 36.09\(5\), Wis. Stats.](#) The student group organized at each UW institution for the purpose of engaging in the allocation process under [s. 36.09\(5\), Wis. Stats.](#), is referred to in this policy as the Student University Fee Allocation Committee or “SUFAC.”

(2) *Non-allocable*. Non-allocable SUF are those SUF that are used to support commitments for fixed financial obligations, personnel costs (except as indicated in Section I (B)(6)(a)(3), ongoing operating and debt service costs of student unions, health centers, child care centers, recreational and athletic facilities and other university owned or controlled buildings; transit and busing services, child care grants; and sports programming including inter collegiate athletics and intramurals, but not club sports. In accordance with [s. 36.09 \(3\), Wis. Stats.](#), chancellors, following consultation with students in accordance with Regent Policy [30-5](#), Policy and Procedures for Segregated University Fees, are responsible for the development of budgets and expenditures of non-allocable SUF.

Who is Eligible for Allocable Segregated Fee Funds?

Only officially recognized student organizations, and university departments to the extent permitted under the [UW System Financial and Administrative Policy 822](#) on “Student Services Funding” are eligible to receive allocable SUF.

Student organizations must meet the following minimum requirements to obtain official recognition:

- a. Organizations must be in “good standing” as defined in the Student Senate bylaws:
- b. Organizations must meet the following requirements to be considered in “good standing”:
 - (1) *Update student organization’s Constitution Form that meets requirements as established by the Student Organizations Commission/Student Senate & UW-System.*
 - a. *Must be updated every two years via [Blugold Connect+](#) organization registration/re-registration process.*
 - (2) *Up-to-date contact information for at least the primary and secondary contacts, treasurer, and University of Wisconsin-Eau Claire faculty/staff advisor*
 - a. *Contact information must be updated within organizations’ [Blugold Connect+](#) profile each year by **October 15th** (and/or anytime there is a change in leadership)*
 - (3) *Complete Annual Mandatory Org Leaders Training (online via Canvas) - (fall)*
 - (4) *Maintain “current” University of Wisconsin-Eau Claire faculty or staff advisor*

If applying for funding, organizations must abide by the following:

- (1) *Be a recognized student organization and in continuous good standing for **one full semester** prior to applying, (example: if your new student organization was approved in the fall of 2021, you can apply for funding the following fall (2022), the spring semester (2022) will be your one full semester as a recognized student organization.*
 - (2) *Must be in good standing at the time of application for funding is submitted*
 - (3) *If, at any point, between an organization’s application for funding being received and July 1st of the same fiscal year, the organization’s good standing is revoked, the organization is no longer qualified to receive its previously approved funding*
 - (4) *The organization MAY NOT currently be involved in, or previously involved in any Student Organization Conduct case(s) within the last 12 months from the date of received application*
- c. Be organized on a not-for-profit basis, as demonstrated by evidence that the organization uses any income or profit for organizational purposes, not for any individual or commercial gain;
 - d. UW System institutions may establish additional requirements for official recognition consistent with this policy.

What Disclosure Responsibilities Do Recipients Have?

Reporting student organization financial information: Student organizations are required to comply with requests for financial information in the circumstances in (a) and (b) of this section. An organization's failure to comply with a request for financial information may result in the **denial of eligibility** to receive SUF and/or the use of university facilities.

- a) All student organizations receiving allocable SUF or using institutional facilities must provide financial records, if requested by SUFAC or by the institution, indicating specific revenues and expenditures for specific events for which SUF support or the use of university facilities was provided.
- b) Where allocable SUF are received for ongoing operations or activities of an organization in accordance with this policy, the organization must provide financial records of its entire operation, when requested by the SUFAC or by the institution.
- c) Failure on the part of a student organization to provide financial information in accordance with this policy may result in suspension or loss of recognition, and privileges associated with recognition.

What Rules Apply to Segregated Fee Spending?

[UW System Administrative Policy 820 \(formerly F50\)](#)

Permitted SUF Expenditures:

Except as limited elsewhere by law or policy, SUF may be assessed and collected for the following:

- a. Travel expenses in accordance with applicable state and UW System travel regulations, and admissions and registration expenses incurred by UW staff or students for:
 1. Attending educational, cultural, social, recreational, or university athletic events.

2. Recruiting students for musical groups, theatrical groups, or publication writing, and the like.
 3. Representing the institution or a recognized student organization in the operation and fulfillment of the mission of the student organizations, student service operations, and student government, subject to approval by the chancellor or his/her designee.
 4. Recruiting athletes, as allowed by conference or membership affiliation.
 5. Busing students within the campus. Payments for bus services that extend beyond the campus boundaries must be approved by the Chancellor or his/her designee.
- b. Expenses related to educational, cultural, social, and recreational activities for:
1. Personal or professional services (e.g., concert performers, bands, officials, lecturers, and other performers); reimbursement for such services provided by UW System faculty or staff may be made in accordance with the provisions of [UW System Administrative Policy 236 \(SYS 236\), Utilization of Independent Contractors](#) on Personal Services Payments and [UW System Administrative Policy 165 \(SYS 165\), The Academic Calendar](#).
 2. Meals, receptions, and transportation incurred by UW faculty or staff or students while performing a host function for a guest speaker, performer, etc., brought to the campus for a SUF funded activity, if such expense was part of the budget approved for the activity.
 3. Production of an event (e.g., films, advertising, promotion, printing, facilities rental, ushers, and security guards). On-campus facilities (buildings and grounds) must be used whenever possible. Exceptions require the prior approval of the Chancellor or his/her designee.
 4. Trophies, medallions and other types of awards for student competitive functions, scholastic excellence, or outstanding school/community service, and funding of athletic or honor banquets or receptions subject to the following guidelines:
 - i. If the organization holding the banquet or reception or presenting the awards receives any SUF support, the institutional SUFAC must specifically approve the expenditure as part of the allocable SUF budget prior to the event.

- ii. Cash or product awards in excess of \$100 but less than \$500 may be given only upon prior approval of the Chancellor or his/her designee. Those in excess of \$500 must be approved by the UW System Vice President for Finance.
- c. Student media expenditures for:
 1. Publishing student newspapers, yearbooks, magazines, paid admission event programs, and other print media. (Student publications are exempt from the state printing regulations per [Section 35.012 Wis. Stats.](#) However, they are not exempt from the regular purchasing regulations in [Section 16.70 Wis. Stats.](#))
 2. Operating student radio and television facilities.
 3. Student film and videotape productions.
- d. Officially recognized athletic program expenditures for:
 1. Uniforms, athletic equipment, travel, supplies and personal services.
 2. Athletes' housing and meals prior to opening of a semester or during vacation periods.
 3. Grants-in-aid as allowed by conference or membership affiliation.
 4. Medical expenses for an athletic injury incurred while participating in an officially recognized athletic event. Injuries related to intramurals, open gym periods, club sports, and student-sponsored athletic events are not covered. (Information on student health insurance is available from the Institution's Risk Management Office.)
- e. Expenditures relating to the operations and activities of student organizations, student health and counseling services, child care centers, student unions, parking, intercollegiate athletics and sports programming, and other student services for:
 1. Salaries for student and other UW staff where related to the activity and in accordance with existing institutional and state wage rates and employment procedures. Payments shall be made in accordance with the provisions of [UW System Administrative Policy 236 \(SYS 236\), Utilization of Independent Contractors](#) and [UW System Administrative Policy 237 \(SYS 237\), Utilization of Borrowed Employees/Employee Interchange Agreements.](#)
 2. Professional services.

3. Facilities, equipment, personal services, and supplies. Organization membership fees in other related and nonprofit organizations.
 4. Debt service.
 5. Direct financial aid as scholarships or stipends to student government leaders.
 6. Child care payments in the form of direct financial aid or grant to an enrolled student.
 7. Payments for municipal services
- f. Promotional items such as key rings, pencils, etc., used to promote an organization's single event or services, provided they are approved through the SUF allocation process.
 - g. Special and ceremonial campus activities in which students are primarily involved provided they are approved through the SUF allocation process.

Prohibited SUF Expenditures:

In addition to other limits established by law or policy, SUF shall not be assessed or charged for:

- a. Academic credit-producing activities;
- b. Student services determined to be essential to the basic mission of the university, as identified in the [UW System Administrative Policy 822 \(SYS 822\), Student Services Funding](#).
- c. Normal campus-wide activities and functions that service the entire institution, such as campus-wide, centrally provided physical plant and institutional support.
- d. Direct financial aid to an enrolled student such as scholarships, tuition, room and board except as permitted in Section I.B.(2)e.5.
- e. Gifts, donations and contributions.
- f. Awards to UW faculty or staff, other than non-monetary, *de minimis* items such as certificates, plaques, and the like.
- g. Costs of legal services, except where the governor has approved hiring an attorney to provide student legal services at an institution.
- h. Lump sum payments to student organizations (as opposed to payments for specific purposes supported by invoices budgets and/or grant applications).

- i. Contracts between a UW institution and a recognized student organization, except where subparagraph (6)(b)(6), below, applies.
- j. Overhead costs of student organizations in facilities not owned, leased, or subject to control by the university, except as permitted in Section I.B.(6)(a), below. As used in this section, overhead costs means those general organization expenses which cannot be charged as belonging exclusively to any particular part of the organization's activities or work, including without limitation because of enumeration, salaries of the organization's employees who are not UW employees, rent, taxes, insurance, lighting, heating, and similar expenses.

Funding Process Timeline

Current Timeline as of Fall, 2022

Date	What is Due	Where/Who
November 1	Application form opens	Available on Blugold Connect Forms
February 4	Application & Budget Proposals due	Submit within Blugold Connect portal
February 15-16	Sign up for presentation time	Student Senate Office Davies 220/Online
3 rd & 4 th week of February	Budget Hearings and Presentations to Student Organizations Commission	TBD Notified via email
Mid-March	Organizations notified of Tentative Budget Requests	Notified via email
3rd week of March	Appeal Request Submitted to Finance Commission	Location Time TBD notified via email sign-up in Davies 220
Late March or Early April	Appeal Hearings with Finance Commission	Location and Time TBD Notified via email Sign-up in Davies 220
Mid-April	Final Budgets Approved by Student Senate and Chancellor	Notified via email

Presentation Criteria

- Business casual recommended
- Be prepared for your presentation
- Be punctual
- PowerPoint or handouts recommended
- Have a budget prepared outlining where the money will be allocated (be as specific as possible)
- Keep summary of your organization brief
 - We know what your group is and what your group does, the commission would like to hear how your organization would allocate the money
- Focus on your budget
- Know the rules regarding where this money can be spent (see pages 4-7)
- Be prepared to answer questions from the committee (do not be intimidated)
- Use respectful language
- Ensure that the person(s) presenting have knowledge of the budget and can answer questions regarding the funding request in an accurate manner (Organization Advisors cannot present, however can be in attendance to help answer questions.)
- 10 minutes will be allotted for the organization to present, in addition, there will be 5 minutes at the end for the Student Organizations Commission to ask questions
- Bring a smile

Presentation Outline

- 15-minute time slot
 - 10 minutes total to present
 - 5 minutes for questions from the commission
- Organization Advisors cannot present, but can be in attendance to help answer questions
- What information should be in the presentation?
 - A very “brief overview” of the organizations’ purpose...what is the student organization?
 - How large is the student organization?
 - How have you funded your student organization in the past?
 - What fundraising efforts has the student organization undertaken?
 - How has the student organization demonstrated fiscal responsibility in the past?
 - What plans does the student organization have to increase revenue in the future?
 - What is this money **specifically** being allocated for?
 - Examples: Travel, conference registration, uniforms, special events, etc.
 - What community/university involvement(s) does the student organization have?
 - What goals does your student organization have that will benefit the university?

Fundraising

4.7 Fundraising Policy (per the Student Organization & Advisor Handbook)

Student organizations are permitted to fundraise for their organization both on and off campus so long as fundraising events follow all university, city, county, state, and federal rules and laws.

Student organizations fundraising on campus may be subject to facility and/or equipment rental fees depending on the nature of the fundraiser and the space required. All events that generate revenue will be charged such fees, with the exception of bake sales.

If an organization is sponsoring an outside vendor to sell products or services, vendors shall not be allowed to sell items in competition with any Davies Center contracted vendors, including Blugold Dining, the University Bookstore, and US Bank. In addition, sales of tobacco, alcohol, or items that can be found in Davies Center vending machines are not allowed. For more information about restricted sale items, please contact the [University Licensing Manager](#).

Organizations wishing to sell food or beverage should refer to the Food on Campus Policy (Section 4.2) and Hosting a Bake Sale (Section 5.7).

Organizations may **not** use the University's tax exemption status for any fundraising efforts. Organizations needing a tax identification number for fundraising purposes may apply through the Internal Revenue Service. Directions are available at: <http://www.irs.gov/pub/irs-pdf/iss4.pdf>. The application is available at: <http://www.irs.gov/pub/irs-pdf/fss4.pdf?portlet=3>.

Student organizations will not use funds collected from the Student Organization Segregated Funding award to purchase alcohol that can only be consumed by members who are of legal drinking age and to purchase promotional materials for unofficial events that can only be attended by those of legal drinking age.

Questions to Anticipate

Questions from the commission to the presenters

**This is a general selection of potential questions – depending upon the information you provide there may be other questions that arise*

- What are current outside funding sources? (i.e. sponsors, donations, membership dues, departments, programs, etc.)
- What are you doing to make your spending more efficient?
- What are the individual costs for members?
- What alternative funding sources have you looked into?
- What aspects of your budget are future estimates or documented expenditures?
- What fundraising efforts has the organization done?
- How does your organization advance the University's mission, goals and values?
- What goals do you have to enhance your organization and/or to increase membership?

Additional Funding Opportunities

Special Allocation Requests

Student organizations that are eligible (in good standing) to receive student segregated fee money. Student organizations that have not been deemed eligible must co-sponsor the event with an eligible student organization or department in order to receive funding. Special allocations requests must meet three criteria:

1. The project must benefit the campus community
2. The project must be a **one-time event**
3. The project must attempt to economize expenses

Process

Apply online (via Blugold Connect+) and submit the completed form to the Director of Finance or the Student Senate Program Manager. The Finance Committee will review it and either approve or deny. Approved allocations will then go to the full Student Senate for a vote.

Funds become available immediately.

Forms: Online via Blugold Connect+

Contact Information: Finance Commission – stusen53@uwec.edu

Student Organization Re-Distribution of Funds Program

Student organizations must spend 90% of their **current** allocation or alert the Student Organizations Commission of their plan to spend the funding, **by the third Monday of March** of the allocation year. If an organization does not follow either of these requirements, their funding will go into the Re-Distribution of Funds system.

1. Student Organizations in good standing can apply for additional funding. The funding can be used until June 30th of the fiscal year.
2. Funding applications will be open during the third week of March for seven days. The application form will be available online via Blugold Connect+.

3. The Student Organizations Commission will meet to review all applications at the next commission meeting following the form closing. Quorum must be met and a majority vote is required to pass an allocation.
4. All UW system restrictions on segregated fees must be followed for redistributed funds/allocations.

Purchasing Card & Reimbursement Policies

1. Student Organization Purchasing Card:

Can be utilized for the following items/services:

- Travel: Airfare, conference pre-registration, some hotel reservations
- Online supplies purchases
- Conference Registration
- Other items upon approval

a. STUDENT ORGANIZATION TRAVEL:

- **BEFORE Your Trip:** Set up an appointment with the Student Senate Program Manager - Student Senate Office - 220 Davies Center, 836-4646
 - ✓ If you are planning on using your allocated funds for travel you **MUST** follow University Rules
 - ✓ You **CANNOT USE** Travelocity, Expedia, Hotwire or similar services to make any type of reservation
 - ✓ Hotel reservations must be made directly with the hotel or by using Concur (the University's online travel reservation system)
 - ✓ Airfare must be reserved using Concur (the University's online travel reservation system)
 - ✓ The University only reimburses for mileage **NOT** gas expenses – AND all drivers must complete the [Driver Authorization Form](#) **ANNUALLY** prior to any trips
 - ✓ Meals and Incidentals – you will receive a per diem amount based on the city you are in
 - ✓ Other Travel-Related Expenses – ie: Cabs, Uber, parking - **KEEP YOUR RECEIPTS to submit for reimbursement**
 - ✓ All car rentals **must** be reserved through the University's contracted car rental company: **Enterprise Car Rental** (reimbursements/reservations will not be processed/made for other rental companies)

2. Student Organization Reimbursement policy:

- All expenses incurred (that were previously approved by the Student Senate) must be substantiated by turning in original itemized receipts **within 30 days after the trip/event/expense date completion** or it will not be reimbursed by the University
- If requesting conference registration or any conference travel related expenses for reimbursement, you must submit a conference agenda in addition to all itemized receipts

a. If expenses were paid for from your student organization account:

- ✓ A [W9 Form](#) AND [EIN number](#) is required to be on file
- ✓ If you don't have an EIN - the bank that you have your account with can assist you in obtaining one for your organization or visit the [IRS website](#) to apply for one
- ✓ After your receipts are submitted to the Student Senate Program Associate – a request for the reimbursement and a check will be issued to your student organization, you will be contacted when the check is ready to be picked up.
- ✓ Student Organizations are encouraged to sign up for direct deposit, [Authorization for Direct Deposit/ACH Payment Form](#)

b. If expenses were paid for out of a personal account:

- The Student Senate Program Manager will submit an Expense Reimbursement for you
 - ✓ If you work on campus the money will be directly deposited into your account
 - ✓ If you don't work on campus a check will be issued and mailed

Student Organizations Commission Responsibilities

1. To be a resource and channel to Student Senate.
2. To help answer any questions that any student organizations' and their members may have about the funding process.
3. To provide information, whether through Blugold Connect+, social media, email or paper mail, in a timely manner as to help student organizations receive information with plenty of time to complete the required tasks.
4. To be available and timely in answering any questions student organizations may have.
5. To ensure that all student organizations have been provided with sufficient amount of information to go through the budget funding process in a smooth manner.
6. To annually review and make any necessary updates/revisions to the Student Organization Funding Handbook
7. To review and hear all student organization funding application requests and budget presentations
8. To deliberate and recommend initial funding allocation amounts to the Finance Commission of the Student Senate

IMPORTANT NOTES & REMINDERS

- ▶ Awarded funds are **not deposited into your org account until expenses are identified and approved by the Student Senate Program Manager** – Stephanie Pyykola, Davies 220, 836-4646
- ▶ Student organizations may only request **up to 5%** of the total Student Organizations budget (Total Student Organization Budget = Approximately \$40,000)
- ▶ All student organization FY2023 segregated fee funding awards will become available July 1st, 2023 and **MUST** be spent by the end of the following academic year (May 2023)
- ▶ **90%** of award allocation **MUST BE SPENT** or subsequent year(s) funding applications will be denied
- ▶ Any remaining allocation awards from the previous year **CANNOT** be transferred over into the next fiscal year
- ▶ Keep all receipts – receipts **MUST MATCH** with what funding was allocated for
- ▶ Any food purchased from off campus vendors must be purchased by members of your organization, original receipts must be kept, and tax will not be reimbursed. An agenda and attendee list from the event must be submitted with your receipt for reimbursement with 30 days of the event.
- ▶ Should you wish to be reimbursed for food for your on-campus events, all food items must be ordered using Blugold Dining/Sodexo (715-836-5661)
- ▶ **ALL EXPENSES MUST BE SUBMITTED WITHIN 30 DAYS OF THE PURCHASE!!**
- ▶ Any re-allocation requests must be submitted in writing to the Student Organizations Commission Director **AND** the Finance Commission Director of the Student Senate

Resources & Contacts

Student Organizations Commission Director

Desk/Mailbox in Student Senate office
220 Davies Center
stusen52@uwec.edu

Finance Commission Director

Desk/Mailbox in Student Senate office
220 Davies Center
stusen53@uwec.edu

Student Senate Program Manager—Stephanie Pyykola

Student Senate office
220B Davies Center
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(715) 836-4646

Senior Coordinator of Engagement —Sara Thommesen

Activities, Involvement, and Leadership office
222B Davies Center
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