

B-009
DESIGNATING THE ALLOCATIONS MANUAL

University of Pittsburgh
Student Government Board

Introduced by President Mike Nites
Co-Sponsored by Allocations Chairwoman Nasreen Harun

Whereas the SGB Code is a collection of governing documents including the SGB Bylaws,

Whereas the Allocations Manual is an important governing document that is enforced and managed by the Allocations Chair with the help of the Allocations Committee,

Whereas organizing the Allocations Manual can help promote a greater understanding of the policies and procedures of the Allocations process,

Whereas there are policies and procedures in the Allocations Manual that are not relevant to the Allocations process,

THEREFORE BE IT RESOLVED, On this 14th day of January in the year of 2014, the Student Government Board Allocations Manual will be known as Title II. All numbering changes to how the document is structured shall be automatic.

1. Title II: The Allocations Manual will have the following chapters:
 - Chapter 1: Purpose and Use of the Student Activities Fee
 - Chapter 2: The Allocations Process
 - Chapter 3: Approved Funding Policies
 - Chapter 4: Policies for Organizations who Receive Funding
 - Chapter 5: The Role of the Allocations Committee
2. Removal of the following sections
 - a. Limits of Certification
 - b. The Student Organization Resource Center
 - c. Vehicle Rental Policy for Student
 - d. Contracts
 - e. Programming Resources
 - f. Account Balances
3. The Chapter called “The Purpose and Use of the Student Activities Fee” will be copied from the current Allocations Manual as shown.
4. The Chapter called “The Allocations Process” will be split into four articles.
 - a. Article I shall be designated as “The Allocations Process, General”

- i. The first section shall read, “There are two ways of obtaining money from the Allocations Process: supplemental requests and budgets. Supplemental requests are as needed funding requests that are evaluated during weekly meetings. Budgets are just one weekend each semester and are for long term planning into the next semester. Although budgets happen once a semester, supplemental requests are always an option.”
 - ii. The second section shall read, “Supplemental requests and budgets that are not complete or do not adhere to the policies and procedures will not be accepted.”
 - b. Article II shall be designated as “The Supplemental Process” and include all information under “Supplemental Requests & Budget Modifications” in the current Allocations Manual.
 - c. Article III shall be designated as “The Budgeting Process” and include all information under the “Fall & Spring Budgeting Process” in the current Allocations Manual.
 - d. Article IV shall be called “Other Procedural Items” and include all information under the “Other Procedural Items” heading in the current Allocations Manual.
5. The Chapter called “Approved Funding Policies” will be split into the following sections with each section copied over from the corresponding current Allocations Manual section.
 - a. Student Life Approved Funding Policies
 - b. Deficit Expenditures
 - c. Food Funding Policies
 - d. Conference Policies
 - e. Club Sports Policies
 - f. Recreation Club Funding
 - g. Funding for All Other Categories of Certified Organizations
 6. The Chapter called “Policies for Organizations Who Receive Funding” will be split into the following sections with each section copied over from the corresponding current Allocations Manual section.
 - a. SORC Officer Certification
 - b. Organization Private Funds
 - c. Solicitation of Donations at SGB Funded Events
 - d. Admission Fees for SGB Funded Programs
 7. The Chapter called “The Role of the Allocations Committee” will be copied from the current Allocations Manual as shown.
 8. The Allocations Manual will be passed exactly as shown.

The resolution shall be effective immediately upon adoption. The attached document is a copy of the Allocations Manual after full passage of this resolution.

Chapter 1. Purpose and Use of the Student Activities Fee

Section 1.01. Student Activities Fees

- A. Student activity fees are collected from all University students and are administered by the Office of Student Life (Student Life).
- B. Student Life provides programs and services for undergraduate students with activity fee revenue. The Pitt Program Council, WPTS-FM, Panther Prints Yearbook, TeleFact, the Student Organization Resource Center, the Student Volunteer Outreach and SGB operating expenses are funded by activity fees.
- C. Student Affairs recognized student governance organizations and recognized undergraduate student governments receive annual activity fee funded budgets approved by SGB. These Student Affairs Affiliated Groups (SAAGs) follow: Resident Student Association; Inter fraternity Council National PanHellenic Conference, Pan Hellenic Association, Black Action Society, Asian Student Alliance, Engineering Student Cabinet and Nursing Student Association.
- D. The Student Government Board (SGB) is recognized by the Vice Provost/ Dean of Students as the governing body for all non-CGS undergraduates. Student life provides SGB with an annual budget to support its programs and services and to provide financial support to eligible certified student organizations according to procedures and policies approved by Student Life.

Section 1.02. Eligibility for Funding

- A. All organizations must be certified by the Student Organization Resource Center (SORC) to officially operate on campus. Certification is a precondition to apply for activity fee funding and must be maintained to remain eligible to expend allocated funds. See www.sorc.pitt.edu for the certification guidelines.
- B. Certified student organizations comprised of 75% non-CGS undergraduates, except recognized social fraternities and sororities, have the right to apply for SGB funding, but do not have a right to funding.

Section 1.03. Funding of Certified Student Organizations

- A. The goal of the SGB activity fee allocation system is to provide the undergraduate student body with a comprehensive array of relevant and desirable activities and programs by providing financial support for certified student organizations created and administered by elected student leaders. There are 365 certified undergraduate organizations in ten categories of activity: academic related, arts/literature, competitive

sports, ethnic /cultural, honorary, political/advocacy, recreational, religious, service and student governance.

Section 1.04. SGB Funding Philosophy

- A. Funding of eligible undergraduate student organizations is a *shared responsibility* of the organizations, their members who primarily benefit from participation and SGB. SGB does not have the financial resources to fully fund the activities of all eligible organizations that request funding.
- B. To help put the shared funding responsibility concept into perspective organizations should realize that all undergraduate students pay the same activity fee and that each contributes to the total amount of funding available to SGB to fund recognized student governance organizations and all eligible certified organizations that apply for funding. Their members are likely members of other organizations and attend events sponsored by other certified organizations.
- C. As a result, it is the expectation of SGB that eligible certified organizations it funds must contribute to the funding of their operation and programs. Funding requests are scrutinized to determine if the members and organization are contributing to the financial support of their funding requests.

Chapter 2. The Allocations Process

Article I. The Allocations Process, General

Section 2.01. The Allocations Process, General

- A. There are two ways of obtaining money from the Allocations Process: supplemental requests and budgets. Supplemental requests are as needed funding requests that are evaluated during weekly meetings. Budgets are just one weekend each semester and are for long term planning into the next semester. Although budgets happen once a semester, supplemental requests are always an option.
- B. Supplemental requests and budgets that are not complete or do not adhere to the policies and procedures will not be accepted.

Article II. The Supplemental Process

Section 2.02. General Information

- A. All deferred requests from fall or spring budgets, submitted by non-Student Affairs Affiliated Groups (non-SAAGs) may be re-submitted as supplemental requests. SAAGs may submit budget modifications for deferred requests or may submit budget modifications into new programming.

- B. All other organizations may also submit budget modifications, and this process will exactly follow the guidelines for submitting a supplemental request. With **ONE DIFFERENCE**:
 - a. Groups are **required** to have both copies of the request signed by the SORC Business Manager to ensure that the money is available in their respective accounts prior to submission.
- C. Supplemental requests or budget modifications must be submitted on the appropriate forms with the required documentation and information to the Allocations Committee by any **Wednesday at 5pm**. The deadline for weekly submission is set by the Allocation Chair and may be changed.
- D. An authorized organization leader must attend the hearing of their request the following **Thursday at 8:30pm**. If a representative does not attend the hearing the request will be deferred to the next week's hearing. If no representative attends the second hearing the request will be withdrawn.

Section 2.03. Supplemental Request and Budget Modification Requirements

- A. The process for the submission and evaluation of these types of requests follows:
 - 1. The organization must submit two, typed and signed copies of a supplemental request to the SGB office by the deadline set by the Allocations Chair.
 - 2. A representative of the group must attend the next weekly meeting of the committee and explain the submitted request, where the Allocations Committee will ask questions as necessary. Attendance stipulations are as follows:
 - a. A student organization representative shall be required to attend the Allocations Committee meeting when the organization's allocations request is being reviewed.
 - b. If a student organization representative fails to attend the Allocations meeting, action on the request shall be postponed until the next week's hearing.
 - c. If a student organization representative fails to attend the second hearing, no action shall be taken on the request, and it shall be considered withdrawn.
 - d. The student organization may then resubmit the request to the Allocations Committee to be scheduled for a hearing by the committee.
 - e. When deemed necessary, the Allocations Committee may waive the attendance requirement and act on the request without the presence of an organization representative.
 - 3. The Committee will then render a decision after private deliberations.
 - a. Requests \$500 or below are subject to the final decision of the Allocations Committee.

- b. For requests over \$500, the decision of the Allocations Committee is merely a recommendation; a final decision must be made by the SGB.
 - c. Requests may be tabled for later discussion at the discretion of the Chair.
- 4. After deliberations, the appropriate Allocations liaison will contact the organization and inform them of the decision or recommendation of the Allocations Committee.
- 5. If the request is for over \$500, at the next public meeting of the SGB (the following **Tuesday at 8:45pm**), the Allocations chair will present the recommendations of the Allocations Committee to the Board.
- 6. A representative of the group is required to attend this meeting to speak on behalf of the request. The organization is given the opportunity to state its case and respond to the Board's questions.
- 7. According to quorum requirements, SGB may approve Allocation's recommendation, deny Allocation's recommendation and approve the original request, revise the recommendation and approve a revised version, table the request for further consideration by the Board, or send the request back to Allocations for a second recommendation.
 - a. If the Board sends the request back for a second recommendation, the Allocations chair will present the second recommendation at the next public meeting
- 8. The Board's decision regarding the request is final and will then be implemented.

Article III. The Budgeting Process

Section 2.04. General Information

- A. Budgets for the upcoming school year are submitted in March. Budgets for the spring term are submitted in late October or early November. The submission and budget hearing schedules will be set by the Allocations Chair and announced well in advance.
- B. Budget requests that do not meet submission requirements and deadlines will not be accepted.

Section 2.05. Budget Submission Requirements

- A. The responsibility for preparation of your budget according to the guidelines rests with each individual organization. Budgets that fail to meet the following conditions will **NOT** be accepted:
 - 1. The budget must be typed, printed and signed on the forms provided and accompanied by proper documentation.
 - 2. All forms and questions must be completed and answered in detail.
 - 3. Budget requests must comply with approved policies.

4. An electronic copy of each request form in the budget **MUST** be sent to the Allocations e-mail account (**sgb.allocations@gmail.com**) prior to the deadline.
 5. A hard copy of the Request Summary and each of the request forms (with appropriate documentation) **MUST** be submitted to the Allocations Committee prior to the deadline in 848 William Pitt Union.
 6. Upon submission of the hard copy budget, a representative of the organization **MUST** then sign up for a time-slot for budget hearings at or before the time of submission, and attend this hearing.
- B. During the budgeting process held in the spring, SAAGs may choose between submitting one of the following: two semester budgets or one annual budget. SAAGs will be held accountable for their choice made in the spring term and will not be allowed to change decisions after the approval of their spring budget.

Section 2.06. Allocations Budget Hearings

- A. A member of the Allocations Committee must sign off on the submission of the budget to ensure that sure the submission meets requirements, that all the forms have been completed correctly and that all information presented to justify the requests is accurate and sufficiently detailed. A representative of the organization will then register for a budget hearing with the Committee.
- B. The attendance of one authorized organization representative is required at the allocations hearing.
- C. The committee reserves the right to act on the budget if a representative is not in attendance and sufficient information is provided in the request. However, the committee may also opt to withdraw the budget from consideration or act on the request at a later date. If the committee chooses to review the request at a later date, the Allocations Chair will then contact the representative submitting the request to consider the budget at a later date, when the hearing can be conducted. The Appeals Process may then proceed after a decision is rendered.
- D. After the hearing, the Committee will deliberate in private consideration of the budget request. A copy of the budget decision will be available in the SGB office the week following your hearing. If you desire an explanation of the decision, you must make an appointment to meet with your Allocations liaison.

Section 2.07. SGB Budget Appeal Requirements

- A. The procedural guidelines for conducting the SGB budget appeal hearings are as follows:
 1. Organizations may file an appeal of the decision of the Allocations Committee with SGB in the Fall and the Spring, *only after* reviewing the budget decision of the Allocations Committee.
 2. If an organization chooses to submit a budget appeal, an authorized organization

leader **MUST:**

- a. Submit a properly completed Budget Appeal Form attached to a copy of the original budget, with the Allocations Decision. This Appeal Form should include only the line items being appealed.
- b. Sign up for a time-slot for appeals' hearings
- c. Attend the appeal to speak on behalf of the budget

Section 2.08. SGB Budget Appeal Hearings

- A. Each appellant representing their respective organization will be asked to make a brief argument against the decision, focusing on specific budget requests that are being appealed. The Allocations Chair will present the rationale for the decision appealed by the group in private deliberations. The Student Government Board will ask questions if necessary and will render a decision without further argument from the group. The SGB, by majority vote of a quorum, will accept or revise the decisions of the Allocations Committee on a line-item basis.
- B. If an authorized organization leader does not attend the appeal hearing, the Board may act on the recommendation of the Allocations Committee or they may choose to postpone the hearing until a later date.

Section 2.09. Deferred Requests

- A. The Allocations Committee may defer a request instead of denying the request. Requests are generally deferred due to budget constraints or incomplete information.
- B. For Student Affairs Affiliated Groups, a deferral allows the group to submit a budget modification in an attempt to later move approved funding into the deferred event.
- C. For all other groups, a deferral allows the request to be re-submitted at a later date as a supplemental.
- D. There should be no expectation that deferral of a request in any way supports its later approval as a budget modification or supplemental request.

Article III. Other Procedural Items

Section 2.10. Recouping Unspent Allocated Funds – The Clearing of Budgets

- A. All unspent or uncommitted funds approved for use by December 31 are returned to the SGB distribution account. All unspent or uncommitted funds as of June 15 are returned to the SGB distribution account.

Section 2.11. Summer Term Operations

- A. Due to the unavailability of Allocations and SGB members during the summer term, the requirement to approve funding requests at public meetings of the Board has been suspended by the Office of Student Life for the summer term. Allocations

recommendations and SGB decisions must be approved by the required number of affirmative votes by a quorum of members as defined by their by-laws. All funding decisions made by the SGB will be reviewed and approved by the Student Life Allocations Advisor.

Section 2.12. Arbitration of Disputes Regarding SGB Funding Decisions

- A. Funding decisions made by SGB must conform to procedures and policies approved by Student Life. Student organizations may file a request for arbitration with the SGB Allocations Advisor regarding decisions made by SGB that are alleged to be inconsistent with policy and/or procedures. The advisor will determine whether or not the request has merit and will be heard or not. If an arbitration meeting is held with representatives of the organization and SGB, the decision of the Advisor is final and no appeal will be accepted.

Chapter 3. Approved Funding Policies

Section 3.01. Student Life Approved Funding Policies

- A. To meet its fiduciary responsibility for the administration of student activity fees, Student life has approved policies to guide the decision making of the SGB in approving allocations to eligible certified student organizations.
- B. **SGB may not fund** the following for Certified Student Organizations:
 - 1. Programs that duplicate or compete with the Pitt Program Council.
 - 2. Donations for any kind.
 - 3. Honoraria or any expenses related to the appearance of any candidate for public office.
 - 4. Salaries, stipends, honoraria or any form of remuneration to advisors, coaches, officers or members.
 - 5. Personal gifts.
 - 6. The purchase of alcohol or tobacco products and any other scheduled substances.
 - 7. Travel expenses for advisors or non-student members.
 - 8. Social or recruiting events.
 - 9. Funding of any request that requires travel outside of the continental United States.
 - 10. First class air fare.
 - 11. The sponsorship of conferences on comprised mainly of external participants.
 - 12. Off -campus leadership retreats.
 - 13. Alternative Spring Break Programming.

14. Expenses judged to be the responsibility of a school, college department or administrative unit sponsoring a recognized student organization.
15. Individual membership dues.
16. Expenses judged to be the responsibility of individual members of student organizations.
17. Expenses for supplies, copies, fax, mail services, etc. provided by the SORC office.
18. Any request previously denied within the same fiscal year.
19. Any previous expenditure that has been completed prior to the submission of the request (Deficit Spending)
20. Spring Break travel unless it is required. Organizations must provide explanatory documentation for its necessity.
21. Certified competitive Club B team competition expenses.

Section 3.02. Deficit Expenditures

- A. Any expenditure or any commitment to expend funds without approved funding by the allocations committee or SGB are **prohibited** and are the sole responsibility of the organization. No supplemental request or budget modification request will be considered.

Section 3.03. Food Funding Policies

- A. SGB will under no circumstances provide funding for food for organizational meetings or recruitment purposes for non-SAAGs.
- B. SGB may elect to fund for food for cultural or ethnic organizations, *only when* the food contributes to the programming by adding significant value to the cultural experience of the event. SGB may not fund cultural organizations for food in excess \$2.50 per Pitt Student attending the Open Programming Event.
- C. SGB may elect to fund for food for SAAGs on the basis of the programming and involvement with significant portions of the Student Body.

Section 3.04. Conference Funding Policies

- A. **Conference Request Definition:** A request by a certified student organization to send members to represent the organization at a conference.
- B. **Funding Limit:** No more than \$2,000 per fiscal year may be allocated to an organization for conference attendance. Do not request more than \$2,000.
- C. **Number of Representatives:** No more than four members will be approved to represent the organization.

- D. **Documentation for the Conference:** The organization's request must provide documentation of the purpose, content and program details of the conference, must demonstrate why the requested number of delegates is required and how attendance by the delegates will contribute to the improvement of the organization's operation, activities and programs.
- E. **Shared Funding Responsibility:** All conference delegates derive personal benefit from attendance at the conference in addition to the benefits derived for the organization. Funding for conference attendance by SGB is considered a shared responsibility of the organization and its delegates. Organizations should not assume that the SGB will routinely approve \$2000 for a conference request.
- F. **Lodging Eligible Expenses:** Only the approved room rate for the location of the conference for one room will be allocated for lodging. How the one room is used is determined by the delegates. Additional lodging expenses must be paid by the organization and/or the delegates.
- G. **Meals:** All meals provided for delegates at the conference via the registration fee will be deducted from the approved per diem for each delegate.
- H. **Other Funding:** Funds for registration and transportation may be approved.

Section 3.05. Competitive Sport Club Funding

- A. Certified competitive sport clubs are independent student organizations and are not an official part of the University. They are certified to operate on campus. They are not permitted to use any form of Pitt's name nor any seal, official logo or trademark. They do not represent Pitt nor compete in its behalf. All off campus activities are the responsibility of the organization, its officers and members.
- B. SGB, however, is permitted to fund on and off campus activities of sports clubs including competition. SGB has established a **\$5,000 per year funding limit for expenses related to competition**. Sport clubs, however, do not automatically receive \$5,000 for competitive expenses. The SGB may, by exception, approve more than \$5,000 for things such as nationals.
- C. The members of competitive sport clubs are expected to contribute to the support of the organization's program and their participation. Sport clubs are encouraged to help fund their program by fundraising.

Section 3.06. Recreation Club Funding

- A. The certified recreational clubs enhance the recreational opportunities offered by Pitt and are an important part of campus life. Pitt does not have the appropriate facilities to accommodate all of varied recreational activities offered by our certified clubs. Likewise, availability of athletic and recreational facilities on campus is not sufficient to meet demand. As a result recreational activities of many of our clubs are held off campus.

- B. Since the members of these organizations are the sole benefactors of participation. SGB expects the members to contribute to the funding of the cost of their operation and programs. Likewise, the clubs are encouraged to help fund their programs by fundraising. SGB will consider funding of off campus recreational activities

Section 3.07. Funding for All Other Categories of Certified Organizations

- A. The philosophy of shared responsibility for funding applies to all eligible organizations. In order to make consistent decisions regarding funding for eligible organizations, SGB employs standard decision criteria to all program requests: purpose, need, value and impact, importance to the organization, timeliness, redundancy, viability, cost/benefit analysis, history and composition of attendance. While most of these criteria relate to the quality of the program, its importance to the organization and its cost effectiveness, the attendance criteria relates directly to the concept of shared responsibility for funding. The more the funding relates solely to the benefit of the organization, is limited to members or involves select members; the expectation of shared funding responsibility on the part of the benefiting members and the organization becomes apparent and will affect SGB's funding decision.

Chapter 4: Policies for Organizations Who Receive Funding

Section 4.01. SORC Officer Certification

- A. Business managers or officers administering the organization budget must attend a certification workshop offered by the Student Organization Resource Center (SORC). Certification is required to conduct organization business with the SORC.

Section 4.02. Organization Private Funds

- B. All certified student organizations that receiving activity fee funding may not have a private outside bank account for the organization. All organization funds must be held in the organization's University account administered by the Student Organization Resource Center. The private funds are kept separate from allocated funds in the account. Expenditures are made through standard University procedures and policies. They remain in the organization's account until expended.

Section 4.03. Solicitation of Donations at SGB Funded Events

- A. Organizations may add a philanthropic dimension to a program funded by SGB by soliciting donations at the event. All donations by attendees must be voluntary. Attendees **MUST** be informed in advance of the program that a donation will be solicited, the benefactor of the donation and its intended use. No admission fee will be approved to generate funds for a donation, and the collection of the donation may not be taken at the door when entering so as to avoid any inference that giving a donation is a pre-condition

for admittance. The collection of voluntary donations can be taken during or after the event. No funding provided by SGB needs to be reimbursed. Though this philanthropic dimension may be added, funding for the program itself must be judged on the merit of its primary purpose first and foremost.

Section 4.04. Admission Fees for SGB Funded Programs

- A. No admission fees may be charged to generate funds for the organization sponsor or for donations for any purpose.
- B. An admission fee may be approved for a program by SGB only if the organization is contributing its own funds to support the program. The revenue from admission fees will be used to reimburse the organization for the amount of funds expended directly by the organization. Any amount over the organization's contribution will be returned to the SGB distribution account. Funds provided by University sponsors, external organizations or individuals will not be reimbursed by admission revenue. The collection of admission fees at the door must be approved by the Wm. Pitt Union Reservations Office and must comply to policy.

Chapter 5: The Role of the Allocations Committee

Section 5.01. The Role of the Allocations Committee, General

- A. In addition to the role prescribed for the committee in the following allocations process described above, the committee holds the responsibility to supervise the expenditure of funds for approved purposes according to established policies and procedures. Accordingly, all activities related to the administration of any approved budget fall under the jurisdiction of the Allocations Committee.
- B. The committee *may recall or freeze the funds of an organization for violations of policy or procedure.*

Section 5.02. Duties of the Allocations Members

- A. The duties of the Allocations Liaisons are to
 - 1. Contact assigned organizations to ensure participation in the allocations process.
 - 2. Assist assigned organizations in preparation of their budget submissions.
 - 3. Receive and sign annual budget request for assigned groups.
 - 4. Represent the point of view of assigned organizations in allocations deliberations.
 - 5. Maintain the file and contact sheet for assigned organizations.
 - 6. Serve as a communications link with assigned organizations and interpret and enforce policies and procedures.
 - 7. Inform assigned groups of the Allocations Committee's recommendations and

decisions.

Section 5.03. Duties of the Allocations Chair

A. The duties of the Allocations Chair are to

1. Serve as a liaison to the Student Government Board, the Student Life Business Office, and the Office of Student Life via the Allocations advisor.
2. Recommend policies and procedures to the SGB.
3. Publicize the allocations process in *The Pitt News*.
4. Write and distribute allocations correspondence.
5. Prepare and chair business manager meetings.
6. Assign liaison responsibilities to committee members.
7. Attend SGB planning sessions.
8. Schedule and chair allocations interviews.
9. Review and approve the rationale for recommendations and coordinate the flow of information according to the prescribed guidelines.
10. Schedule and present allocation recommendations to the SGB.
11. Review budget requests with the allocations advisor prior to budget hearings.
12. Submit all approved budgets, modifications, and supplemental requests to the Student Life Business Office.
13. Coordinate the work of the SGB secretary in relation to the work of the Allocations Committee.
14. Supervise the selection of committee members and chairperson and train, direct and supervise the performance of the committee and its individual members.
15. Serve as a spokesperson for the committee.