

# The Allocations Manual

## Article 1. Purpose and Use of the Student Activities Fee

### Section 1. Student Activities Fees

#### *Item 1. Student Activities Fees*

- A. Student activities fees are collected from all University students and are administered by the Office of Student Life.
- B. Student Life provides programs and services for undergraduate students with student activity fee revenue. The Pitt Program Council, WPTS-FM Radio, the Student Office of Sustainability, the Office of PittServes, The Pitt News, the Student Organization Resource Center (SORC), and SGB operating expenses are funded in part or in whole by student activities fees.
- C. Since Student Government Board is recognized by the Vice Provost and Dean of Students as the governing body for all non-CGS undergraduate students, Student Life provides SGB with an annual budget to support its programs and services, and to provide financial support to eligible student organizations according to policies and procedures outlined in this Allocations Manual.

#### *Item 2. Eligibility for Funding*

- A. To be eligible for funding, all student organizations must:
  - 1. Be currently registered with the SORC with up to date officers. Registration is a precondition to apply for SGB funding and must be maintained to remain eligible to expend allocated funds. (See <https://www.studentaffairs.pitt.edu/sorc/> for certification guidelines.)
  - 2. Be comprised of at least 75% non-CGS undergraduate students
  - 3. Not be a recognized social fraternity or sorority
  - 4. Not have a bank account outside the University to manage student organization funds
- B. Eligible student organizations have the right to apply for SGB funding, but do not have a right to funding.
- C. The term “student organization” in the rest of the Allocations Manual shall refer only to groups who meet the above criteria.

### Section 2. General Funding Philosophy

#### *Item 1. Funding of Student Organizations*

- A. The goal of the SGB Allocations system is to provide financial support for student organizations so that they can develop a comprehensive array of relevant and diverse activities and programs.

- B. Student organizations are divided into in ten categories of activity: arts/literature, competitive sports, ethnic/cultural, honorary, political/advocacy, recreational sport, religious, service, special interest, and student governance.

### *Item 2. SGB Funding Philosophy*

- A. Funding of student organizations is a shared responsibility among the student organization as a whole, the individuals within the organization who primarily benefit from participation in that organization, and SGB. SGB does not have the financial resources to fully fund all the activities of student organizations that request funding.
- B. Because all undergraduates pay the same activity fee that contributes to the total amount of funding available, and because students are likely members of other organizations and attend events sponsored by other organizations, it is the expectation that each student organization and its members contribute to the funding of their own operations and programs.
- C. Funding requests are scrutinized to determine if members and organizations are showing shared responsibility for the financial support of their organizations.
- D. Examples of shared responsibility include fundraising, sponsorships (departmental or external), price negotiations, deliberate efforts to reduce costs, any out-of-pocket expenses, and dues collection.

## **Article 2. SGB Procedural Guidelines for the Allocations Process**

### **Section 1. Allocations Process Overview**

#### *Item 1. Allocations Process Overview*

- A. There are two ways of obtaining funding through the Allocations process: supplemental requests and budgets.
  - 1. Supplemental requests are as-needed funding requests that are evaluated during weekly meetings.
  - 2. Budgets are submitted optionally once per semester and are for long term planning into the next semester or fiscal year.

#### *Item 2. Expectations of Student Organizations*

- A. It is the expectation that representatives submitting requests on behalf of student organizations:
  - 1. Be knowledgeable of all policies and procedures written in the Allocations Manual. SGB and the Allocations Committee will do its part to help student organizations understand all policies and procedures by holding several Allocations 101 presentations throughout the semester and posting guides online.

2. Contact an Allocations Committee liaison when needed to clarify any funding procedures or obtain assistance when submitting a request.
3. Submit all funding requests and budget modifications for annual events in a timely manner. A decision's proximity to an event date will not be considered a compelling reason to act on a request. Student organizations are responsible for preparing for both outcomes.
4. Are undergraduate executive board members of the requesting organization

### *Item 3. General Submission Requirements for Both Supplemental and Budgets*

- A. Supplemental requests and budgets that are not complete or do not adhere to all policies and procedures in this Allocations Manual will not be accepted. The Allocations Chair has the right to make exceptions on a case by case basis when submission requirements cannot be met.
- B. Requests that include line items from previously denied requests will not be accepted.
- C. Any allocations requests that are made by a sitting Board Member or Allocations Committee Member will not be accepted.
- D. A formal defense of any request, be it public or private, cannot be made by a sitting Board Member or Allocations Committee Member.

### *Item 4. Entire Requests Submitted at Once*

- A. Requests for an event or travel must be submitted on one request.
  1. Student organizations collaborating must submit one request with all student organization names listed in the justification section of the request. All funding will be deposited into the account of the organization submitting the request.
- B. Requests that include additional expenses from a previous request will not be considered, except at the discretion of the Chair.
- C. Specific submission requirements for Supplemental Requests and Budgets are listed in the designated sections.

### *Item 5. Presentation of Documentation*

- A. Every cost listed on the request must have documentation.
- B. Documentation may include any proof of price from the source, but is not limited to: an official quote, an email confirmation, a printout, or a picture of a price from a vendor.
- C. All documentation must be submitted with the request.
- D. Whenever possible, documentation must be contemporary (i.e., not from previously submitted requests for the same or similar purchase(s) or event(s)).

- E. Documentation for mileage must be a printout from a website such as Google Maps detailing the exact mileage requested.

#### *Item 6. Withdrawn Requests*

- A. Groups may withdraw a request at any point before final approval.
- B. Withdrawn requests, or any components of them, may be resubmitted at the discretion of the Allocations Chair.
- C. SGB shall not consider withdrawn requests when reviewing future requests.

### *Section 2. The Supplemental Process*

#### *Item 1. Supplemental Submission Requirements*

- A. Student organizations may submit supplemental requests for as-needed funding during the Allocations Committee's weekly meetings.
- B. All deferred requests from fall or spring budgets may be re-submitted as supplemental requests.
- C. Governance Groups may submit supplemental requests but may receive no more than \$5,000 through the supplemental process in addition to any budgeted funding.

#### *Item 2. Supplemental Review Process*

- A. The process for the submission and evaluation of these types of requests is as follows:
  - 1. The Allocations Chair shall create an online submission form and set a submission deadline. This form and deadline shall be posted publicly. The Allocations Chair may set additional submission requirements, including limiting the total number of requests to be heard per week. All additional submission requirements shall be posted publicly.
  - 2. The Allocations Committee shall hear any request meeting the publicly posted submission deadlines and requirements during its next regular meeting. An undergraduate representative of the group must attend the designated meeting.
  - 3. During the supplemental hearing, the representative of the group will be asked to explain the submitted request. The Allocations Committee will ask questions as necessary.
    - a. If a student organization representative does not attend the Allocations meeting, action on the request shall be postponed until the next week's hearing.
    - b. 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.
    - c. The student organization may then resubmit the request to the Allocations Committee to be scheduled for a hearing with the Committee.

- d. When deemed necessary, the Allocations Committee may waive the attendance requirement and act on the request without the presence of an organization representative.
4. The Committee will then render a decision after private deliberations.
  - a. The Allocations Committee decision is final for requests of \$2,000 or less unless the Committee decides it is necessary to share the responsibility of the decision with the Board.
  - b. For all requests that the Allocations Committee does not make a final decision on, the Committee provides a recommendation to the Board, which must make a final decision on the request.
  - c. Requests may be postponed for later discussion at the discretion of the Chair or by Committee vote.
5. After deliberations, the appropriate Allocations liaison will contact the organization and inform them of the decision or recommendation of the Allocations Committee.
6. If the request is subject to Board approval, at the next public meeting of the Board, the Allocations Chair will present the recommendations of the Allocations Committee to the Board.
7. For requests subject to Board approval, groups may remove expenses from their request or provide previously missing documentation prior to the Board's review. However, if groups wish to increase the amount requested or change the nature of the items for which they are requesting, the request must go back to the Allocations Committee for review prior to moving on to the Board.
8. An undergraduate 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.
9. The Board may approve or revise the Allocations Committee's recommendation.
10. The Board's decision regarding the request is final.

### Section 3. The Budgeting Process

#### *Item 1. General Budget Submission Timeline*

- A. Budgets for the upcoming academic year or fall term are typically submitted in March. Budgets for the spring term are typically submitted in October.
- B. The submission and budget hearing schedules will be set by the Allocations Chair.

#### *Item 2. Budget Submission Requirements*

- A. Budgets must be submitted as follows:
  1. The budget must be submitted as directed by the Allocations Chair.
  2. All forms must be completed and answered in detail.
  3. Upon submission of the budget, a representative of the organization must then sign up for a time-slot to attend a hearing.

- B. During the budgeting process held in the spring, groups may choose between submitting a semester budget or an annual budget.

### *Item 3. Allocations Budget Hearings*

- A. At least one undergraduate organization representative is required to attend the Allocations Hearing.
  - 1. The Allocations Committee may postpone or withdraw the budget if a representative does not attend, but reserves the right to act on the budget.
- B. The Allocations Committee may approve or deny each request within the budget in part or full.
- C. The Allocations Committee may also defer an entire request within the budget for later consideration through the supplemental process.
  - 1. Requests are generally deferred due to budget constraints or incomplete information.
  - 2. There should be no expectation that the deferral of a request in any way supports its later approval as a supplemental.
- D. After the hearing, the Allocations Committee will deliberate in private and render a decision on the budget. A copy of the budget decision will be available in the SGB office the week following the hearing. Student organizations are expected to review budget decisions in the SGB Office the week following budget hearings.
- E. The Committee may additionally decide to send the request to be appealed to the Board. The Allocations Committee may do this when it feels that it is necessary to share the responsibility of the decision with the Board.

### *Item 4. Budget Appeal Submission Requirements*

- A. After reviewing the budget decision of the Allocations Committee, organizations may file an appeal.
- B. If an organization appeals a budget, it must appeal the entire budget as a whole.
- C. If an organization chooses to submit a budget appeal, an undergraduate organization representative must:
  - 1. Submit a properly completed Budget Appeal Form.
  - 2. Attend an appeal hearing to speak on behalf of the budget.

### *Item 5. Board Budget Appeal Hearings*

- A. All budget appeals will be conducted in a public forum, approximately one week after Allocations Budget Hearings.
- B. Each representative will be asked to make a brief argument against the decision, focusing on their desired specific budget requests.

- C. The Allocations Chair will present the rationale for the decision appealed by the group.
- D. The Board may debate or ask questions as necessary.
- E. The Board may accept or revise the decisions of the Allocations Committee.
- F. If a representative does not attend the appeal hearing, the Board may act on the recommendation of the Allocations Committee or it may choose to postpone the hearing until a later date.

## Section 4. The Funding Release Process

### *Item 1. Funding Release Process*

- A. Student organizations are encouraged to return unspent allocated funds. Student organizations who release unspent funds will have the returned balance subtracted out of any funds counted towards caps.
- B. The student organization shall fill out the Funding Release form to return funds.
- C. For each Funding Release request, the Allocations Chair shall verify with SORC that the funds exist to be released and then approve the request.
- D. Requests that are released in full prior to any funds being expended shall not be considered by SGB when reviewing future requests.

### *Item 2. Recouping Unspent Allocated Funds*

- A. All unspent or uncommitted funds at the end of the fiscal year (June 30th) are returned to the SGB distribution account.

## Section 5. Request Modification

### *Item 1. Rationale*

- A. SGB recognizes that it may not always be desirable for groups to use funds for the exact items requested, and therefore SGB has established this policy to govern these situations. In all cases, groups are responsible for any costs in excess of approved amounts. If costs are less than the approved amount, groups are asked to complete a funding release form to return the excess to SGB for redistribution.
- B. In this section, “substantively” is defined in relation to the criteria under which the original request was reviewed. An item is substantively the same as an approved item only if it is equivalent to the approved item as assessed by all criteria applied when the request was approved. If a group is unsure how to apply this definition to a particular request, they are encouraged to reach out to the Allocations Chair for clarification.

### *Item 2. Tier 1 Modifications*

- A. Groups may freely make the following modifications without SGB approval or notification
  - 1. Purchase the item requested for a different price
  - 2. Use an alternative vendor for the same item (i.e. using a different airline for airfare or using a different store to purchase an item).
  - 3. For travel requests, change the number and/or identity of non-CGS undergraduate Pitt students attending.
  - 4. Change the date or time of an event, unless the new dates are in a different term than the original dates or the new dates are during a time when classes are not in session.

### *Item 3. Tier 2 Modifications*

- A. The following modifications require certification by the SGB Allocations chair that the modification is consistent with the original request, does not violate any established policies, and does not change the nature of the original request. If the chair does not so certify, the modification shall be reviewed by the Allocations Committee as prescribed in Item 4.
  - 1. Change the dates of an event when the new dates are in a different term than the original dates or are during a time when classes are not in session.
  - 2. For all expenses except for honorarium, purchase an item which is substantively different from the requested item but accomplishes the same purpose.
  - 3. For travel requests, change the origin, destination or mode of transportation of airfare or ground transportation line items.
  - 4. For honorarium, change the recipient when honorarium is not the largest line item in the request.

### *Item 4. Tier 3 Modifications*

- A. The following modifications require review by the Allocations Committee. The Committee shall consider whether the modification is consistent with the original request, whether it violates any established policies, and whether it changes the nature of the original request. The Committee shall accept or reject the modification.
  - 1. For honorarium, change the recipient when honorarium is the largest item in a request.
  - 2. All other modifications not defined as Tier 1 or 2 modifications.

### *Item 5. Rejected Modifications*

- A. If a modification is rejected, the group has the option to utilize the funds as originally allocated or release the request in full. Groups may not resubmit any rejected modification requests, but may submit multiple unique modification requests at the discretion of the Allocations Chair.

## *Section 6. Summer Operations*



### *Item 1. Summer Operations Suspension*

- A. SGB is not required to review requests during the summer term.
- B. Student organizations who wish to receive funds for the summer months must submit a supplemental request if the funds are to be used before June 30th or submit a budget in the spring if the funds are to be used after June 30th.

### *Item 2. Summer Operation Exception*

- A. For unforeseen situations, the Allocations Committee Chair may choose to hear a funding request remotely but is not compelled to do so.
- B. All funding decisions made in the summer will be reviewed and approved by the SGB Allocations Advisor.

## **Section 6. Request Confidentiality**

### *Item 1. Justification*

- A. In the interests of protecting the privacy of individual student leaders, as well as limiting undue attention to the specific activities of individual student organizations, SGB imposes limits on the release of information about specific Allocations documents.
- B. SGB recognizes the interests of many students in knowing about the allocation of the Student Activities Fund, and this policy does not limit the release of generalized or categorical data, such as amounts approved and denied by request or organization type.

### *Item 2. Released Information*

- A. The following details are released for any supplemental request that is subject to Board approval, and any budget request that would be subject to Board approval if submitted as a supplemental.
  - 1. Organization name, request number, request type, request title, amount requested, Allocations recommendation (both amounts and written justification), and Board approved totals.
- B. The Allocations Chair shall make this information available to members of the media upon request at the Board public meeting at which the decision occurs, or the next regular public meeting in cases where a decision is made during a special meeting.
- C. SGB may release an entire request only to the requestor themselves or, at the discretion of the Allocations Chair, to the executive board of the submitting organization.
- D. In no case will SGB release the name or identifying information of any student submitting a request.

## **Section 7. Arbitration of Disputes Regarding SGB Funding Decisions**

### *Item 1. Arbitration Process*

- A. Funding decisions made by SGB must conform to procedures and policies contained in this document. Student organizations may file a request for arbitration with the SGB Judicial Committee regarding decisions made by SGB that are alleged to be inconsistent with policies or procedures.
- B. The Judicial Committee will hold a hearing and hear testimony from both the student organization and the Allocations Committee or Board, depending on who made the final decision on the request.
- C. The Judicial Committee will determine if the decision made is inconsistent with the policies or procedures in the Allocations Manual and make a ruling consistent with the committee's bylaws.
- D. After the Judicial Committee's decision, either party may appeal to the SGB Allocations Advisor
- E. The advisor will determine whether or not the appeal 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 further appeal will be accepted.

## **Article 3. Funding Policies**

### **Section 1. Preamble**

#### *Item 1. Origin of Funding Policies*

- A. To meet its fiduciary responsibility for the administration of student activity fees, the University of Pittsburgh and Student Government Board have collaborated to establish a set of approved policies to guide the decision making of the SGB in approving Allocations requests.

### **Section 2. Funding Policies and Exceptions for Requests Generally Not Approved for Funding**

#### *Item 1. Requests Generally Not Approved for Funding*

- A. There are characteristics or categorizations that make requests invalid, either every time or only when failing to account for and apply special circumstances or additional measures, respectively.
- B. SGB shall not fund the following for any student organization:
  - 1. Programs that duplicate or compete with specific Pitt Program Council events
  - 2. Donations, giveaways, or personal gifts of any kind
  - 3. The purchase of alcohol, tobacco, and controlled substances
  - 4. Any expense related to the appearance of any candidate for public office

5. Salaries, stipends, honoraria or any form of remuneration to advisors, coaches, officers, or members
  6. Travel expenses for any coach, advisor, or non-undergraduate student members
  7. First class airfare, unless required by invited guest
  8. Expenses for items and services such as supplies, copies, fax, and mailing which are available in SORC
  9. Off-campus retreats
  10. Individualized membership dues
  11. Expenses intended to fulfill academic department requirements (i.e., any expense related to senior design projects)
  12. Social or recruiting events
  13. Capital improvements to any facilities
- C. With additional reasoning outlined in the following Items, SGB shall not fund the following for any student organization:
1. Deficit spending
  2. Expenses judged to be the responsibility of a school, department, or administrative unit
  3. Programs whose primary purpose is to serve as a fundraiser for organizational benefit or charity
  4. Expenses not in compliance with University policies
- D. Unless special circumstances are accounted for and additional measures have been applied, as outlined below for each type, SGB shall not fund the following for any student organization:
1. Any request previously denied within the same fiscal year
  2. On-campus conferences and competitions
  3. Expenses judged to be the responsibility of individual members of student organizations
  4. Spring Break Travel
  5. Travel outside of the United States and Canada

#### *Item 2. Deficit Spending*

- A. Should an organization expend funds or commit to expend funds prior to receiving funding from SGB, these expenses are the sole responsibility of the organization, and may not be funded.
- B. Deficit spending occurs at the point when the student organization is contractually committed to spending the money.
- C. No requests that involve deficit spending shall be approved.

#### *Item 3. Expenses Judged to be the Responsibility of a Sponsoring Unit*

- A. SGB shall not fund for expenses judged to be the responsibility of a school, department, or administrative unit sponsoring a recognized student organization.

- B. SGB will evaluate how much the sponsoring unit benefits from the funding.
- C. SGB may deny expenses that are deemed to be primarily departmental (i.e., sheet music that is placed into a department's music library or an event organized primarily by departmental staff).

#### *Item 4. Programs Primarily as Fundraisers*

- A. SGB shall not fund programs or purchases whose primary purpose is to serve as a fundraiser that benefit the organization or a charity.
- B. Organizations may add a philanthropic dimension to their events through the policies and procedures outlined in Article 4 of this manual (3.2.4 of the Governing Code).

#### *Item 5. Noncompliance with University Guidance*

- A. SGB shall not fund expenses related to activities that are not in compliance with University health or safety guidance for student organizations, the specific type of expense (event, travel, etc.), or any other applicable guidance.
- B. SGB shall hold all organizations to the highest standards issued that apply to any group of student organizations. For example, if sponsored organizations are held to higher standards than independent organizations, SGB shall only fund expenses in compliance with the standards for sponsored organizations.

#### *Item 6. Previously Denied Requests*

- A. Except for a successful appeal to the Judicial Committee, as outlined in Item 3.2.2.7.1, any request previously denied in whole within the same fiscal year shall not be funded.
- B. SGB may not fund any previously denied expenses.

#### *Item 7. On-Campus Conferences and Competitions*

- A. Because non-Pitt students do not pay into the Student Activities Fund, SGB shall not fund for on-campus conferences and competitions comprised of more than 25% participants who are not undergraduate non-CGS Pitt students.
  - 1. SGB may fund for on-campus conferences and conventions comprised of at least 75% undergraduate non-CGS Pitt students.

#### *Item 8. Expenses Judged to be Individual*

- A. SGB shall not fund expenses judged to be the responsibility of individual members of student organizations.
- B. In deciding this, SGB will examine how much individual members benefit and may hold the student organization to a higher expectation of shared responsibility. To enforce shared responsibility, SGB may deny such expenses.

- C. SGB will examine if the item funding is requested for stays with the individual or the organization, should the individual leave the organization.

#### *Item 9. Spring Break Travel*

- A. SGB shall not fund for spring break travel, unless the dates are outside of the organization's control.
  - 1. Events like annual conferences, regular season or playoff competitions, and week-long service events often cannot occur at other points in the year, and may therefore be judged to be outside of the organization's control.
  - 2. Events like warm-up tournaments or conferences with multiple date ranges may not be eligible to receive funding.
- B. The travel will be heavily scrutinized on whether it needs to occur during the specified dates.
- C. Organizations must submit actual dates of activity as well as planned travel dates, and these are strictly expected to be followed. Violations of this rule are grounds for funds to be recalled.

#### *Item 10. Travel Outside of the United States and Canada*

- A. Due to inherent liabilities, potentially insubstantial necessity, and high costs associated with international travel, SGB shall not fund for travel outside of the United States and Canada unless the organization is able to demonstrate careful consideration for these imperatives (i.e., presented itineraries, safety plans, strong commitments to shared responsibility, etc.).
- B. SGB shall review the purpose and need of attending, history of organization's travel, and how attending relates to the purpose of the organization. The requestor must specifically demonstrate how attending will impact and positively add value to the organization.
- C. Since organizations that engage in international travel are often the sole campus benefactor of these events, SGB places a high expectation of shared responsibility on these organizations. SGB expects that the members contribute to the funding of their operation.

### *Section 3. Policies Based on Intent of Request*

#### *Item 1. Standard Decision Making Criteria*

- A. In order to make consistent decisions regarding funding for eligible student organizations, SGB employs the following standard decision-making criteria when evaluating all request:

1. Purpose – Is the request consistent with the espoused organizational purpose for which the group has been registered? How does the request contribute to the mission of the organization?
  2. Need – Does the request reflect or meet unsatisfied needs? Has the need been documented? What is the level of need and its importance to undergraduate students?
  3. Value/Impact – What is the desired goal of the request and how will the participants, the organization, and the University benefit? What is the nature of the benefit? Is the benefit lasting?
  4. Importance to Organization – How important is the request to the existence and viability of the organization? How highly does the organization rank this program in comparison to its other requests?
  5. Timeliness – Is the request scheduled at an appropriate date and time? Is there enough time for necessary contracts to be processed?
  6. Redundancy – Is the request need already fulfilled? Has a similar request already been approved? Has another organization requested the program? Has the program been offered before?
  7. Viability – Is the request adequately manageable and within the scope of the sponsor's capability? Are adequate on-campus facilities available?
  8. Cost/Benefit Analysis – What is the per capita expenditure for participants or attendees? Is the need served and benefit derived from the request worth the per capita expenditure? Can the student activities fund reasonably bear the cost of the request?
  9. History – Is the program a successful annual or traditional event? What has been the history of similar events?
  10. Composition of Attendance – Who is benefiting from the request? Is it primarily undergraduate non-CGS Pitt students?
- B. While most of these criteria relate to the quality of the request, its importance to the organization, as well as its cost effectiveness are also considered, and composition of attendance relate directly to the idea of shared responsibility.
- C. The more the funding relates solely to the benefit of the organization, or is limited to members or involves select members, the expectation of shared funding responsibility on part of the benefiting members and the organization increases and will affect SGB's funding decision.

## *Item 2. Conferences*

- A. Conference Request Definition: A Conference Request is a type of request submitted by a student organization to send students to represent the organization at a conference.
- B. Shared 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 SGB will routinely approve conference requests.

- C. **Decision Making Criteria:** SGB shall review the purpose and need of attending, history of attending the conference and how attending relates to the purpose of the organization. The requestor must specifically demonstrate how attending will impact and positively add value to the organization and campus as a whole. SGB recognizes that the missions of pre-professional organizations often include aiding their membership in career preparation. Consequently, SGB may fund for pre-professional organizations to attend conferences with a predominantly career-oriented focus, as long as the information acquired at the conference can be brought back to campus to benefit all of the organization's members.
- D. **Funding Cap:** No more than \$3,000 per fiscal year may be allocated to an organization for all conference attendance.
- E. **Number of Representatives:** Expenses for no more than four members will be funded to represent the organization. Delegates from multiple organizations may be sent to the same conference based on demonstrated need of attendance and applicability of the conference to organizations' missions.
- F. **Registration:** SGB may fund for individual registration fees.
- G. **Lodging:** One standard hotel room may be approved for lodging per four students attending, or the amount of non-standard lodging necessary for attending students.
- H. **Airfare:** Airfare between the conference location and Pittsburgh may be approved.
- I. **Ground Transportation:** Ground transportation between the conference location and Pittsburgh may be approved according to the following policies. Student organizations wishing to be reimbursed for tolls must provide additional documentation proving the toll amount at the time of submitting the request.
  - 1. For personal vehicles, the IRS Reimbursement Rate valid on the first day of the fall semester for moving purposes may be approved
  - 2. For rental vehicles, the cost of the rental vehicle may be approved as well as the rate for personal vehicles.
  - 3. Bus, train, or other ground transportation may be approved.
- J. **Meals:** SGB will not fund for meals at conferences.

### *Item 3. Competitions*

- A. **Competition Request Definition:** A Competition Request is a type of request submitted by a student organization to send students to any type of competition.
- B. **Shared Responsibility:** All individuals participating in a competition derive personal benefit from attendance at the competition in addition to the benefits derived for the organization. Funding for competitions by SGB is considered a shared responsibility of the organization and its members.

- C. Decision Making Criteria: SGB shall review the purpose and need of attending, history of attending the competition, how attending relates to the purpose of the organization, and how much the organization is contributing. SGB will also consider the type of organization submitting the request (i.e., competitive sport, recreational sport, special interest, etc.).
- D. Registration: SGB may fund for individual and/or team registration fees. Organizations should understand that SGB may sometimes deny individual registration fees to promote shared responsibility as these are the most individualized expenses.
- E. Lodging: One standard hotel room may be approved for lodging per 4 students attending, or the amount of non-standard lodging necessary for attending students.
- F. Airfare: Airfare between competition location and Pittsburgh may be approved.
- G. Ground Transportation: Ground transportation between the competition location and Pittsburgh may be approved according to the following policies. Student organizations wishing to be reimbursed for tolls must provide additional documentation proving the toll amount at the time of submitting the request.
  - 1. For personal vehicles, the IRS Reimbursement Rate valid on the first day of the fall semester for moving purposes may be approved
  - 2. For rental vehicles, the cost of the rental vehicle may be approved as well as the rate for personal vehicles.
  - 3. Bus, train, or other ground transportation may be approved.
- H. Security Deposits: SGB may not fund for security deposits or any other refundable deposits related to appearances at competitions.

#### *Item 4. Off-Campus Program*

- A. Off-Campus Program Request Definition: An Off-Campus Program Request is a type of request submitted by a student organization for expenses related to any event that requires travel for non-conference and non-competition purposes (i.e., transportation to service sites or practices).
- B. Shared Responsibility: All individuals traveling derive personal benefit from attendance, in addition to the benefits derived for the organization. Funding for travel by SGB is considered a shared responsibility of the organization and its members. Off-campus program requests carry a high expectation of shared responsibility.
- C. Decision Making Criteria: SGB shall review the purpose and need of travel, how traveling relates to the purpose of the organization, and how much the organization is contributing. SGB will also consider the type of organization submitting the request (i.e., competitive sport, service, etc.).



- D. Lodging: One standard hotel room may be approved for lodging per 4 students attending, or the amount of non-standard lodging necessary for attending students.
- E. Airfare: Airfare between the event location and Pittsburgh may be approved.
- F. Ground Transportation: Ground transportation between the event location and Pittsburgh may be approved according to the following policies. Student organizations wishing to be reimbursed for tolls must provide additional documentation proving the toll amount at the time of submitting the request.
  - 1. For personal vehicles, the IRS Reimbursement Rate valid on the first day of the fall semester for moving purposes may be approved
  - 2. For rental vehicles, the cost of the rental vehicle may be approved as well as the rate for personal vehicles.
  - 3. Bus, train, or other ground transportation may be approved.

#### *Item 5. On-Campus Programs*

- A. On-Campus Program Request Definition: An On-Campus Program Request is a type of request submitted by a student organization for funding related to any event taking place on the Oakland campus.
- B. Shared Responsibility: SGB recognizes that student organizations put on programs as a service to the student body. The expectation of shared responsibility is dependent on the program's reach and openness to the student body. Closed events or events not held in a University building will have a much higher expectation of shared responsibility placed on the organization and may be denied.
- C. Decision Making Criteria: SGB shall review the need, value, impact, history of the program, and past successes of the organization. In addition, SGB shall review how the program relates to the purpose of the organization and its ability to attain attendees.
- D. Honoraria, Airfare, and Lodging: SGB may fund for honoraria, airfare, and lodging according to the contract proposed by the invited individual or group.
  - 1. Cost/Benefit Analysis of Honoraria, Airfare, and Lodging: Events with an invited individual or group have a large impact on campus that reaches far beyond the membership of the organization hosting the event. Expected attendance shall be the key factor in the cost/benefit analysis of honoraria, airfare, and lodging. SGB shall heavily scrutinize any event requesting more than \$100 per expected attendant for honoraria, airfare, and lodging.
  - 2. Funding Cap on Honoraria, Airfare, and Lodging: No more than \$30,000 per fiscal year may be allocated to an organization for all honoraria, airfare, and lodging. Student organizations collaborating on an on-campus event that is consistent with each of the organization's purposes may share their funding cap at the discretion of the Allocations Chair, who will determine how the expenses are counted against each organization's cap.

- E. Ground Transportation: Ground transportation may be approved according to the following policies. Student organizations wishing to reimburse invited individuals for tolls must provide additional documentation proving the toll amount at the time of submitting the request.
  - 1. For personal vehicles, the Corporate IRS Reimbursement Rate valid on the first day of the fall semester may be approved.
  - 2. For rental vehicles, the cost of the rental vehicle may be approved as well as the IRS Reimbursement Rate valid on the first day of the fall semester for moving purposes.
  - 3. Bus, train, or other ground transportation may be approved.
- F. Purchases: SGB may fund for purchases related to the program. SGB shall scrutinize the following for purchases: need, including necessity to the request and safety; value, including importance to the organization's mission and cost-benefit analysis; and reusability, including the expected length of usage, any lasting benefits and the existence of alternatives.
- G. Food: SGB may elect to fund for food for on-campus programs, only when the food contributes to the programming by adding significant value to the experience of the event (i.e., cultural or educational benefit).
  - 1. SGB does not fund for full meals and instead may elect to provide a sampling of the food. SGB may not fund for food in excess of \$3.00 per expected Pitt student attending the open programming event.
  - 2. SGB will under no circumstance provide funding for food for organizational meetings, membership recruitment purposes, or closed events for any organization.
- H. Services: SGB may fund for services related to the program according to the following policies.
  - 1. Facilities Costs: SGB may fund for services such as facility rental costs, custodial services, grounds crew, sound engineers, and other facilities costs. SGB will not fund security deposits unless the deposit goes towards the total cost of the service (i.e. is not refunded at the conclusion of the program). Additionally, any costs relating to damages due to a program are the responsibility of the organization, and will not be funded by SGB.
  - 2. Security: It is the responsibility of the student organization to provide adequate security to ensure a safe environment for all persons at a program and the event facility. SGB may fund security costs, in line with a cost/benefit analysis (defined in Item 1). Not all costs requested may be covered, even if the University requires them. Any additional costs are the responsibility of the student organization, in accordance with the shared responsibility policy.
  - 3. Other: SGB may fund other services deemed essential to the program.
- I. Miscellaneous: SGB may fund for miscellaneous items on the basis of need, value and purpose.

### *Item 6. General Expense*

- A. General Expense Request Definition: A General Expense Request is a type of request submitted by a student organization related to some type of operational expense not directly related to any single event.
- B. Shared Responsibility: SGB recognizes the importance of operational expenses (i.e., national dues for an organization) as well as other purchases, services, and rentals. SGB considers funding of these expenses to be a shared responsibility between SGB and the organization.
- C. Decision Making Criteria: SGB shall review the following: need, including necessity to the request and safety; value, including importance to the organization's mission and cost-benefit analysis; and reusability, including the expected length of usage, any lasting benefits and the existence of alternatives. SGB will also consider the type of organization submitting the request (i.e., competitive sport, service, etc.).

## *Section 4. Policies for Student Group Categories*

### *Item 1. Recreational Sport Organizations*

- A. Since the members of these organizations are the sole benefactors of participation, SGB places a high expectation of shared responsibility on these organizations. SGB expects that the members contribute to the funding of their operation.
- B. SGB will consider funding of off-campus recreational activities. In many instances, SGB will elect to offer transportation to and from the recreational activity but will expect that the organization and its members cover expenses incurred while at the activity.
- C. SGB recognizes that recreational sport organizations may occasionally wish to attend competitions. For this reason, SGB may fund competition expenses for such organizations up to \$2,000.

### *Item 2. Competitive Sports*

- A. SGB recognizes competitive sports as valuable on-campus opportunities for students, as well as the financial obstacles facing many club sports. As such, SGB may aid competitive sports in mitigating the high costs of operating.
- B. However, SGB also recognizes a student's decision to participate in a competitive sport on campus as an acknowledgement of the costs associated with participating. Because it is SGB's general funding philosophy to be a source of financial assistance and not a source of primary funding, the level of funding an organization is eligible to receive shall be tied directly to the level of financial contributions put forth by the organization itself through dues, fundraising, and out of pocket expenses towards team expenses.

- C. Each organization will be eligible to receive a level of funding per fiscal year of up to the equivalent of a set of ratios of the organization's total financial contributions deposited in its SORC account the prior fiscal year for team expenses. Thus, the maximum level of funding an individual club may receive per fiscal year is determined by a set of ratios of club contributions to SGB funding. Specifically:
  - 4. For the first \$15,000 that a student organization contributes towards team expenses, SGB may match up to one half (i.e., a 1:2 ratio) of the organization's total financial contributions deposited in its SORC account during the prior fiscal year.
  - 5. For any additional money that a student organization contributes above \$15,000 towards team expenses, SGB may match up to one-third (i.e., a 1:3 ratio) of the organization's total financial contribution deposited in its SORC account during the prior fiscal year.
- D. The overall SGB contribution cap for all expenses shall not exceed \$12,500 for competitive sports organizations with submitted roster sizes of fewer than 75 students, and \$15,000 for competitive sports organizations with roster sizes equal to or greater than 75 students.
- E. Clubs' maximum caps may be adjusted in the middle of a fiscal year at the clubs' request if their submitted roster size increases to a higher tier of eligibility.
- F. Any organization that would be eligible for a cap of less than \$2,000 will have its maximum funding level set to \$2,000. Student organizations that have existed for less than one year and therefore do not have deposits for the previous fiscal year shall have their maximum funding level set at \$3,000.
- G. All expenses are bound by the maximum level of funding that a club is eligible to receive. The Allocations Committee may not approve more than the maximum funding level. In addition, clubs should not expect to automatically receive funding up to this maximum level.
- H. For spring budgets each year, clubs' caps for the following fiscal year will not yet be available. Therefore, when calculating funding eligibility for the next fiscal year for clubs that submit a spring budget, the Chair will utilize the club's SORC deposits from the spring of the previous fiscal year, in conjunction with the club's SORC deposits from the fall of the current fiscal year. Prior to the beginning of the following fiscal year, the Chair will recalculate the club's cap using actual spring deposits from the spring in which the budget in question was submitted. Groups will not be penalized if the revised cap falls below the amount of funds that they were allocated in the spring.

### *Item 3. Other Competitive Organizations*

- A. The funding limit for competition expenses for other competitive organizations is \$5,000 per year.

- B. SGB may provide non-sport competitive organizations with funding for nationals-related expenses in excess of the \$5,000 cap if the club has demonstrated a strong commitment to shared responsibility throughout the fiscal year.
- C. Since the members of these organizations are the sole benefactors of participation, SGB places a high expectation of shared responsibility on these organizations. SGB expects that the members contribute to the funding of their operation.

#### *Item 4. Funding for All other Categories*

- A. The philosophy of shared responsibility for funding applies to all student organizations.
- B. 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 increases and will affect SGB's funding decision.

### **Section 5. Policies for Governance Groups**

#### *Item 1. Conferences for Governance Groups*

- A. The funding limit for conferences for a Governance Group is \$5,000 per fiscal year for all conference attendance.
- B. The organization must justify the number of delegates to be sent, and one standard hotel room may be allocated for lodging per four students attending, or an amount of non-standard lodging necessary to house the attending students.

#### *Item 2. Food for Governance Groups*

- A. SGB may elect to fund for food for Governance Groups on the basis of involvement with significant portions of the student body.
- B. The amount approved for such a program shall not exceed \$3.00 per Pitt student attending.

#### *Item 3. Executive Board Retreats*

- A. SGB may fund for up to \$2,000 for an executive board retreat.
- B. In order to be eligible for SGB funding, there must be documented proof that at least one advisor will be attendance.
- C. All costs associated with the attendance of an advisor as well as meal expenses incurred by the organization during the retreat are the responsibility of the student organization or sponsoring department.

#### *Item 4. Governance Group Conferences*

- A. SGB may fund for expenses related to a Governance Group hosting a conference for its governed members and organizations.
- B. SGB may approve for meals up to \$3.00 per expected Pitt student in attendance.
- C. An agenda for this conference must be submitted with the request.

#### **Article 4. Policies for Student Organizations Which Receive Funding**

##### **Section 1. Admissions Fees, Charging for Items, and Donations**

###### *Item 1. Admission Fees for SGB Funded Programs*

- A. An admission fee is any charge for any portion of an SGB-funded on-campus program, even if the charge occurs before, during, or after the program.
- B. No admission fees may be charged to undergraduate Pitt students to generate funds for any purposes including donations.
- C. Any suggested donation placed at the entrance shall be considered an admissions fee.
- D. An admission deposit that is returned to students following attendance at an SGB-funded on-campus program is not considered an admission fee, but SGB will scrutinize any such deposits to ensure they do not unnecessarily limit access by eligible students.

###### *Item 2. Charging for Items*

- A. Student organizations may not charge Pitt students for any item funded in full or in part by SGB (i.e., an organization publishing an SGB funded magazine could not charge Pitt students to receive a copy).
- B. Student organizations may not charge Pitt students for any item that was created through SGB funding (i.e., an organization publishing a magazine that was using an SGB funded computer could not charge Pitt students to receive a copy).
- C. Any suggested donation shall be considered charging for an item.

###### *Item 3. 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. SGB must be informed in advance of the program that a donation will be solicited.
- B. The collection of the donation may not be taken at the door when entering so as to avoid any indication 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.

- C. 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 since SGB does not fund for fundraisers.

## **Article 5. Procedures for Violations of Policies**

### *Item 1. Authority of the Allocations Committee*

- A. The Allocations 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 funds fall under the jurisdiction of the Allocations Committee.
- B. In cases of suspected violations of policy or procedure, the Allocations Chair may freeze funds for one week or until the next regular meeting of the committee. The committee may recall or freeze the funds of an organization for violations of policy or procedure, and may place other sanctions on the organization or its officers as appropriate.
- C. Student organizations may appeal any enforcement actions, in writing, to the Judicial Committee.