



Emerson College

Treasury Handbook

2013-2014

Hello! If you have found yourself with copy of this Handbook, you most likely have decided to take on the great responsibility of serving the Emerson community as an Organization Treasurer or President. I want to take this opportunity to be the first to thank you for your service. While the college is known for our many amazing organizations, one of Emerson's best kept secrets are our passionate student leaders. None of the amazing events and activities of the organizations throughout each year would be possible without the hard work of the people who make sure the numbers all add up. If at times the work seems thankless, remember all of the students who benefit from your organization and from your commitment, and know that the Student Government Association appreciates your efforts.

This document is meant to serve as a go-to guide for any help that you need while fulfilling your duties. Inside you will find information on properly filling out forms, making acceptable financial transactions, other general procedures, and much, much more. Please read over this guide, but most importantly, return to it when you feel stuck. If you are unsure of anything, turn back to this handbook to try to find an answer. But of course, if you're still stuck, feel free to reach out to me throughout the year. I will always be happy to assist you and help you find the solution that is best for your organization.

You should be very proud of yourself for your dedication to your organization and to your college. Your reward will be all of the great things that your organization and its members are able to accomplish thanks to your hard work.

- John Dentinger
SGA Executive Treasurer

Contact Information

John Dentinger
SGA_Treasurer@emerson.edu
(518) 641-2995

Fall 2013 Office Hours

Walk In Hours: Wednesdays 1-3:45
By Appointment Only: Tuesdays 11-11:45; Thursdays 11-11:45, 2-3:45
*150 Boylston (Piano Row) Campus Center
Office of Student Life (2nd floor)*

SGA Joint Session meets Tuesdays at 2 PM: <http://sga.emerson.edu>

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Revised Summer 2013 by John Dentinger, SGA Executive Treasurer (2013-2014)

Acknowledgements:

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Sharon Duffy, Associate Dean of Students
Tanya Flink, SGA Executive Treasurer (2011-2013)
Corey Starbuck, SGA Executive Treasurer (Spring 2011)
Stefany Tomas, SGA Executive Treasurer (Fall 2010)
Jenn Barry, SGA Executive Treasurer (2008-2010)
Katy Boungard, SGA Executive Treasurer (2007-2008)
Emily Patrick, SGA Executive Treasurer (2006-2007)
Katie Caponera, SGA Executive Treasurer (2005-2006)
Melissa Gaynor, SGA Executive Treasurer (2004-2005)
BJ Warminski, SGA Executive Treasurer (2003-2004)
Krista M. Gundersen, SGA Executive Treasurer (2001-2003)

Introduction

Purpose of SGA

Emerson College's Student Government Association acts as a representative of the student body to faculty, staff, administration, and the community at large. The Student Government Association works to address student interest to better accommodate the needs of the student body on both academic and social levels.

Responsibilities of SGA

- Representing student interests, rights, and concerns
- Stimulating student awareness of and involvement in the many organizations, activities, and opportunities available in the Emerson community
- Promoting student awareness and appreciation of the values and traditions of the college
- Enhancing communication and cooperation between all segments of the campus community
- Providing and overseeing funding for student activities and organizations through a fair and representative annual process

***Note:** With recognition also comes responsibility of managing your organization's programs realistically within the limitations of existing resources and opportunities. The College seeks to support and encourage all student organizations in their creative process and will offer advice and assistance at every turn. We ask that you recognize that physical and financial resources are limited for both academic and co-curricular programs and seek your assistance in setting priorities and adjusting your plans as these limitations necessitate. We encourage you to seek the advice of both your faculty/staff advisor and the Associate Dean of Students in setting your priorities and in managing your organization's plans.*

For more information about Emerson College SGA, please visit: <http://sga.emerson.edu>.

Purpose of the SGA Executive Treasurer

The SGA Executive Treasurer acts as the liaison between the SGA recognized student organizations and Emerson College's Business and Finance offices. The SGA Executive Treasurer communicates with the organizations regarding the allocation and management of the organization's funding. All transactions made by SGA recognized organizations must be approved by the SGA Executive Treasurer.

Responsibilities of the SGA Executive Treasurer

- Create an overall budget for SGA, based on enrollment information and student activities fees through the FAB process.
- Act as a liaison between student organizations and Emerson College Business & Finance Department.
- Audit the financial records of all SGA-funded organizations.
- Monitor all charges to all SGA-funded organizations.
- Present an Executive Treasurer's report and make recommendations on financial matters to the SGA Joint Session and Emerson College officials when needed. Executive Treasurer's reports will be recorded in the minutes, which are available online through the SGA official website.
- Explain the financial system to all organization Presidents and Treasurers.
- Oversee organization purchases of products and services from College vendors.
- Oversee and facilitate the annual Financial Advisory Board (FAB).
- Have final approval and signing authority over all SGA-related financial matters.
- Post and hold weekly office hours.

Note: *The SGA Executive Treasurer is not responsible for keeping receipts from purchases made by an organization. It is the sole responsibility of the organization to keep copies of all of their submitted paperwork and receipts on file. Neither SGA nor Student Life will keep copies of submitted receipts, bids, contracts, etc.*

Purpose of Organization Treasurers

The treasurer organizes and keeps a record of all the organization's finances. The treasurer must be aware of and understand their organization's fiscal needs, and balance the budget accordingly. It is also necessary that the treasurer understand all of the policies and procedures outlined in this handbook, and be able to communicate those policies and procedures to all members of your organization involved with any financial matters. Please read this entire handbook carefully to avoid any future mistakes and subsequent delays.

Responsibilities of Organization Treasurers

- Knows and follows the correct procedures for obtaining, spending, and depositing money for the organization.
- Helps maintain a balanced budget for the organization's operations.
- Keeps track of the organization's account number and copy code.
- Keeps detailed records of the organization's finances. This includes ALL paperwork such as: receipts, information regarding phone, copy, postage, and other expenses. It is highly advised that the treasurer makes photocopies of every

form their organization submits for the entire year, AND notes the date in which the form(s) was submitted to the SGA Executive Treasurer's inbox.

- Keeps track of any equipment or materials the organization purchases or owns and has an updated inventory on file with the SGA Executive Treasurer (for insurance purposes). Be aware that only organizations with allocated office or storage space from the College are able to purchase equipment, office supplies, or large props. If the purchased item(s) cannot fit into an organization's College designated storage space, the purchase(s) will not be approved.
- Keeps the organization's advisor and members informed about financial matters.
- Consults with the SGA Executive Treasurer and Associate Dean of Students about possible expenditures.

Note: No commitment for products or services should be made without the expressed and advanced approval of the SGA Executive Treasurer.

General Procedures

Overview of Emerson College Financial Procedures

Emerson College is a tax-exempt institution. In order to legally maintain this status, the College and SGA organizations must follow rules and business procedures as set forth by the IRS. SGA is the administrator of the student activities fee, which each student pays every year, and therefore the following must be adhered to in order to maintain smooth financial operations:

- The Organization Treasurer and President must attend one of the Treasurer's Workshops in the Fall and your organization must Reactivate with the Office of Student Life before anyone can access the organization's account. Additional Treasurer's Workshops may be held throughout the year if necessary.
- All financial paperwork must be submitted to the "Incoming SGA Paperwork" mailbox in Office of Student Life located on the second floor of 150 Boylston Street. Paperwork submitted elsewhere (i.e. in the SGA mailbox, left with the student staff in the Office of Student Life, etc.) will not be processed.
- Forms must be filled out completely and accurately, including account numbers, mailing addresses, an Emerson identification number, and accurate local or permanent contact information. If incomplete paperwork is submitted, it will be rejected. The SGA Executive Treasurer will then contact the Organization Treasurer via email to complete paperwork and resubmit it.
- Any incomplete paperwork will result in processing delays.
- All forms must be signed by an Organization's President, Treasurer, and Advisor before submitted to the SGA Executive Treasurer. Each form submitted for processing must contain all the necessary approval signatures. No exceptions. Forgery of any names will result in College disciplinary action, including loss of signatory authority and loss of funding.
- Organizations must keep copies of all paperwork sent/submitted to the SGA Executive Treasurer and/or Associate Dean of Students, including supporting documentation such as receipts, contracts, price quotes, bids and invoices.
- As a non-profit organization, Emerson College is exempt from certain taxes; therefore, never pay taxes when purchasing products or services for your organizations. SGA-funded organizations are eligible to use the College's tax-exempt number, which can be requested by emailing the [SGA Executive Treasurer](#) or the [Associate Dean of Students](#). In your email, please include the name, address, phone, fax, and email of the business and the reason for requesting these documents. The certificate will be sent directly to the requested vendor within two weeks. If a vendor requests a tax exempt certificate, contact the Office of

Purchasing and Risk Management through the [Associate Dean of Students](#) and she/he will assist you in securing this documentation. Please note that we are responsible for taxes of overnight hotel rooms.

- For computer equipment, the Information Technology department must be contacted to obtain bids and approval of purchases before submitting a Purchase Order Requisition Form. You may contact Helpdesk@emerson.edu for further information and instructions.
- The Vice President for Information Technology also must approve and sign for any computer equipment purchases over \$250.
- For all purchases over \$1000, the Office of Office of Procurement Services must be contacted directly via email at purchasing@emerson.edu (while cc-ing the [SGA Executive Treasurer](#) and [Associate Dean of Students](#)) in order to request assistance in securing at least three written bids or price quotes from three separate companies. Any purchases over \$3000 will go through a formal bid process managed by the Office of Procurement Services.
- The Dean of Students must approve and sign for any transaction over \$1000.
- There is an estimated three week turnaround for all submitted paperwork.

Note: Always submit paperwork far in advance of any deadline you may have.

Restrictions on use of funds:

Certain expenditures of SGA funds are not permissible. Funds cannot be used for:

- Alcohol, Cigarettes, or Tobacco Products (even those used as props)
- Anything Illegal (i.e. Parking Tickets, Speeding Tickets, Fines, etc.)
- Gifts for organization members or advisors
- Late fees
- Taxes; bottle deposits; and/or tips
- Any donation to any organization (Emerson-related or not) where the money donated was not fundraised
- Cash awards
- Expenditures for meals exceeding the per diem rates
- Tickets for school events, such as ERA Awards, the EVVY Awards (submissions or tickets), etc.
- Live animals (used as props or otherwise)
- Academic department or classroom related activities
- Spending that is inconsistent with an organization's purpose as stated in its constitution or the SGA constitution

There are certain items that require permission from the SGA Executive Treasurer prior to purchase. In order to request prior approval for these, send an email to the [SGA Executive](#)

[Treasurer](#) and the [Associate Dean of Students](#) indicating the reason for the request and the details around the purchase (an itemized list and pricing of the purchases in question). Without explicit permission from the SGA Executive Treasurer, funds cannot be used for:

- Food for closed or general meetings
- Bottled Water
- Clothing
- Pre-paid cash cards and gift cards
- Door prizes or other awards
- Rush charges.

All paperwork must be submitted by the last day of class of the semester. Late paperwork will be considered on a case by case basis. Paperwork submitted late is NOT guaranteed to be processed.

Inquiries regarding financial paperwork must be made within three months in which the paperwork was submitted. No exceptions.

Using Emerson Approved Vendors

Emerson Approved Vendors

Using an Emerson approved vendor is the quickest, easiest, and most reliable and cost effective way to purchase the products or services your organization needs. Paperwork is also processed more efficiently when working with Emerson approved vendors since their information is already on file with the Business and Finance Office. All Emerson approved vendors accept Purchase Orders and will supply the products or services prior to receiving payment, and many offer discounts.

Emerson College maintains a list of approved vendors, or companies approved by the College that have proven to be competitive and reliable. The Emerson approved vendor list is extensive. Contact the [Associate Dean of Students](#) to inquire about recommendations for Emerson approved vendors.

For more information regarding Emerson approved vendors, see the Purchase Order Requisition Form section.

Note: *While a business may indicate that they accept Purchase Orders as a means of payment, that does not guarantee that Emerson College will issue one to them for services. An Emerson College Purchase Order will only be issued to those vendors that have entered into a contractual agreement with the College (ie. Emerson approved vendors).*

Six Forms for Organization Funds

There are six primary forms you should be familiar with in order to draw upon an organization's SGA funds. Each individual form has its own serial number and are only available in the Office of Student Life (ie. they cannot be printed out). It is recommended that you keep a small supply of forms for your organization's convenience. You must submit original forms, copies will not be accepted.

Purchase Order Requisition Form

- To be used as a contract with an Emerson approved vendor.

Check Request Form

- To be used to request a payment to a non-Emerson approved vendor/business.
- To be used to request a cash advance (for advisors only).

Consultant Payroll Request Form

- To be used to request a payment to a non-Emerson individual (including alumni).

Reimbursement Request Form

- To be used to request a reimbursement to Emerson students, faculty, and staff.
- To be used to submit return of advances (for advisors only).

Deposit Form

- To be used to deposit funds into your organization's account.

Co-Sponsorship Form

- To be used for transferring funds from one SGA recognized organization to another. To be initiated and completed by the sponsoring organization.

Note: *Using the correct form for each transaction is extremely important. The majority of delays experienced with the Treasury result from incorrect paperwork. Incorrect paperwork will be rejected, and the Organization Treasurer will be contacted via email with. All rejected forms will be available in Office of Student Life in the "Rejected" folder.*

Purchase Order Requisition Form

The majority of purchases by your organization should be made via the Purchase Order system. There are many advantages to this system, the greatest being that students do not have to provide their own payment at any time during the transaction. Another advantage to using Purchase Orders is having the negotiating power and legal prowess of the Office of Purchasing and Risk Management behind you, since the school, not the student, is purchasing the product/service.

Completed and approved Purchase Orders serve as contracts. If an Emerson approved vendor does not meet the requirements set forth on the order, then the College and your organization are not liable for payment. This serves as a safeguard for student organizations, since payment follows delivery and there is a hard copy of the agreement.

How the Purchase Order Requisition process works:

After the Purchase Order is completed, the transaction is identified with a Purchase Order number, which is sent directly to the vendor via mail, phone, or fax. If the vendor specifically requests it hand-delivered, the SGA Executive Treasurer can provide you with the written Purchase Order number.

Because payment follows delivery with Purchase Orders, it is vital that you inform the SGA Executive Treasurer and the Office of Purchasing and Risk Management that you have received the product or service. Upon receipt of the product or service, email the [Associate Dean of Students](#) stating that the Purchase Order is clear to release for payment. Releasing the Purchase Order must be done as soon as possible to ensure timely payment to the vendor.

When submitting a Purchase Order Requisition:

- Purchase Orders are to be used for Emerson approved vendors, Information Technology (IT), and Travizon Travel Services (Air only).
- Purchase order forms must be filled out completely with all supplemental information. You must attach a price quote, bid and/or contract stating services and/or products and prices. The price quote must be obtained from the company itself, and must contain all associated charges (including screen charges, shipping, delivery, etc). A print out of your online shopping cart is not a price quote.
- The Office of Purchasing and Risk Management requires that for all purchases \$1000 or more, at least three written price quotes from three different companies be secured and attached to the PO Requisition Form. The Purchasing Office must be

involved in obtaining these price quotes.

- A Purchase Order Requisition number is NOT a Purchase Order number. The Purchase Order number will be generated by Office of Purchasing and Risk Management and sent to the vendor after all approvals are secured.
- Last-minute purchase order requisitions will not be accommodated. Plan ahead.

Remember, Emerson College maintains a list of approved vendors, or companies approved by the College that have proven to be competitive and reliable. The Emerson approved vendor list is extensive. Contact the [SGA Executive Treasurer](#) or the [Associate Dean of Students](#) to inquire about recommendations for Emerson approved vendors.

For more information regarding Emerson approved vendors, see the Emerson Approved Vendors section.

Remember:

- Emerson College is a tax-exempt institution; any checks withdrawn from an SGA-funded account may not include taxes.
- Keep a copy of all paperwork submitted for your records.
- Always complete all required information on submitted paperwork.

Check Request Form

The check request form is used to pay a non-Emerson approved vendor/business for their services. Check requests are processed through the Accounts Payable Office, and are cut every Friday once the request has been processed. The check will be made payable to the company for the amount specified, and may be either picked up at the Student Service Center or mailed.

In order for this form to be processed, you must submit the following:

- Completed check request form
- An invoice or contract
- A completed and original W9 form. No faxes, scans, or copies will be accepted.
- A Employer Identification Number (also known as a Federal Tax ID Number)

A cash advance of up to \$500 may also be requested by your group's advisor using this form. Only advisors may receive a cash advance contingent on the pre-approval of the SGA Executive Treasurer and the Associate Dean of Students. Cash advances must be reconciled within five (5) business days after use. A completed SGA Reimbursement Request Form must be submitted to the Office of Student Life within this time period. The requestor of the advance will be held accountable for any missing funds. Advance checks for advisors may be picked up by the advisor who requested the advance or mailed to the home address of the advisor, upon request of the advisor..

Remember:

- The check request form may only be used when the services provided are not available through an Emerson approved vendor.
- Emerson College is a tax-exempt institution; any checks withdrawn from an SGA-funded account may not include taxes.
- If a contract is involved, it must be pre-approved by the Associate Dean of Students before any paperwork is brought to the SGA Executive Treasurer. (See section on Contracts for more information).
- Keep a copy of all paperwork submitted for your records.
- Always complete all required information on submitted paperwork.

Consultant Payroll Request Form

Consultant payroll request forms are used to pay non-Emerson individuals for their services. Consultant payroll checks are cut according to a set schedule established by the Payroll Office, usually every other Friday. Payment via Consultant payroll may take up to five weeks. Consultant checks are typically mailed directly to the payee.

In order for this form to be processed, you must submit the following:

- Completed consultant payroll form
- An invoice or contract (See section on Contracts for more information)
- A completed and original W9 form. No faxes, scans, or copies will be accepted.
- A Social Security Number

Remember:

- The consultant payroll form may only be used when the services provided are not available through an Emerson approved vendor.
- Emerson College is a tax-exempt institution; any checks withdrawn from an SGA-funded account may not include taxes.
- If a contract is involved, it must be pre-approved by the Associate Dean of Students before any paperwork is brought to the SGA Executive Treasurer. (See section on Contracts for more information).
- Keep a copy of all paperwork submitted for your records.
- Always complete all required information on submitted paperwork.

Reimbursement Request Form

The Reimbursement request form is used to reimburse currently enrolled Emerson College students and/or faculty and staff advisors for money spent on organization-related purchases and to reconcile cash advances obtained by advisors.

It is preferable that an organization utilizes the Purchase Order system rather than reimbursements for its own financial security. If a reimbursement is necessary, you may wish to obtain the SGA Executive Treasurer's pre-approval to ensure the reimbursement can be honored. Never assume that a reimbursement is guaranteed!

Warning: Spend money out of pocket at your own risk! Do not ask members of your organization to pay for items out of pocket if it will put them in an uncomfortable financial situation. There is almost always another way to make a purchase for your organization without creating a financial burden, as long as the organization plans far in advance. Also, remember that it is not the responsibility of an Organization Treasurer to use his or her own money for Organization purchases! Again, never assume that a reimbursement is guaranteed--and therefore never allow a student to spend their own money for an Organization purchase without understanding the risk.

How the Reimbursement Request process works:

Once approved by the SGA Executive Treasurer, the form will be submitted to the Accounts Payable Office for processing. Once the form is processed, a check will be made out to the Emerson individual for the amount specified. Checks are cut every Friday once it has been received by the Accounts Payable office.

Reimbursements can either be picked up at the Student Service Center or mailed. This is to be specified on the Reimbursement Request Form. Please note that students living in the residence halls must pick up their checks at the Student Service Center; they will not be placed in their mailbox.

Take note of the following rules and procedures for Reimbursement Requests:

- It is necessary to include the Emerson ID number of the individual being reimbursed in order to process the reimbursement (including if the individual is a faculty/staff advisor).
- Be sure to include the reason/project/name/date/location of the project to which the reimbursement is related; forms will NOT be processed without this information. For example, if a student is being reimbursed for props for a production, the event title

must be included.

- Original receipts covering the amount requested must accompany a completed Reimbursement Request Form. The receipts must be either stapled or paper-clipped to the form (ie. no envelopes, tape, ziplock bags, glue, glitter glue, etc). If submitting multiple receipts, please staple them to an 8.5 x 11" piece of paper and number the receipts to match the entry on the Reimbursement Request Form. Please list all reimbursement entries and receipts in date order.
- If receipts are submitted noting a group meal, you must list the names of all those present.
- You must submit the detailed receipt when submitting credit card receipts; summary receipts (including summary receipts for credit/debit cards) will not be accepted. Bank statements will not be accepted to show proof of payment. No exceptions.
- It is your responsibility to obtain proof of payment. Proof of payment is either the last four digits of the credit/debit card and/or a cash expenditure noting a net balance of zero.
- Submitting a copy of a check you wrote does not suffice as proof of payment; in those instances, you must contact your bank and ask them to send you a copy of the front and back of the cancelled check. This is not a unique request, banks do it all the time.
- Taxes, tips, and/or bottle deposits will not be reimbursed. Be aware that most beverage purchases will include bottle deposits. Please make sure your form does not include these amounts before you submit it.
- Alcohol, tobacco, or other items prohibited to be purchased using SGA allocated funds will not be reimbursed.
- Students/Advisors will NOT be reimbursed for travel that has yet to occur and are encouraged to use the College's travel agency.
- Reimbursements will not be processed for travel that has yet to occur.
- Reimbursements will not be processed for Sodexo charges.
- Reimbursements will not be processed for EC Cash or Board Bucks charges.
- Reimbursements will not be processed for Print/Copy charges, nor for the use of individual student print credits.
- Reimbursement Request Forms cannot be used to pay individuals other than currently enrolled Emerson College students and employees; to pay non-Emerson individuals (including Alumni) please submit the Consultant Payroll Form. We will also NOT reimburse a student if they have paid a vendor or person for a service provided out of their own pocket.
- Reimbursements will not be made for compensation paid to non-Emerson individuals (meaning, you cannot pay an individual for a service and then submit a receipt to be reimbursed). Such payments for compensation are processed through

Check Request or Consultant Payroll Forms.

- Reimbursements will only be made when the use of a Purchase Order is not available. The SGA Executive Treasurer and the Associate Dean of Students reserve the right to withhold or cancel any reimbursements they deem adverse to college policy; such decisions will be made at their discretion when there is lacking evidence to justify the purchase.
- As per Emerson College policy, reimbursements accompanied by original receipts older than ninety (90) days will not be honored. Reimbursement will not be made for expenses which have not been submitted within 90 days of the expense or events/trips that have not yet occurred.

Make sure that you are fully aware of all of the previously listed rules and regulations for submitting a Reimbursement Request Form. Historically, Reimbursement Requests are the forms most likely to be turned in incomplete. This is especially unfortunate because a delay in processing a reimbursement request results in a longer amount of time that a student is without their money.

It is your responsibility as an Organization Treasurer to take the Reimbursement Request process seriously, following all procedures and making sure to turn in complete and organized paperwork. Failure to do so will result in a rejection of your reimbursement request. Once a form is rejected, the Organization Treasurer will be notified via email and the form will be available for pick up in the “Rejected” folder the Office of Student Life.

Remember:

- Keep a copy of all paperwork submitted for your records.
- Always complete all required information on submitted paperwork.

Deposit Form

The Deposit Form is used to deposit money into an organization's SGA account, usually after a fundraiser or after ticket sales. All money raised by an organization must be deposited into the organization's SGA account.

Money must be brought to the SGA Executive Treasurer within 24 hours of its receipt for counting. Please do not leave funds in the SGA Executive Treasurer's mailbox. Be sure to clearly mark the envelope with the organization's name and address it to the SGA Executive Treasurer. The money will then be secured in the Student Life safe until the deposit can be made. Make a copy of any checks and the deposit form for your records.

When submitting a Deposit form:

- Do not keep money collected in your residence hall room or apartment.
- As per College policy, a fundraising form must be on file in the Office of Student Life prior to any collection of money.
- All checks being deposited should be made payable to Emerson College.
- All checks being deposited should include the individual's telephone number and address, as well as the organization name and account number.
- Organizations are responsible for bounced checks and will take the monetary loss and any associated check bounce fees. It is the responsibility of the organization to secure payment from individuals/companies whose checks had bounced.
- Organizations must make copies of the checks you deposit to keep on file.
- When depositing cash, band like bills together and exchange coins for bills.
- It can take up to three weeks or longer for a deposit to be posted and appear in your organization's budget; please be patient.
- Until your account is credited with the deposit, these funds may not be used.

Remember:

- Keep a copy of all paperwork submitted for your records.
- Always complete all required information on submitted paperwork.

Note: *If someone would like to make a donation to your organization, they are more than welcomed to. Donations usually go through the College's Office of Institutional Advancement, where it can be specified that the donation is to go to your organization. If the donor cuts you a check, it may be deposited using a Deposit form. However, if donated funds are not spent in a given fiscal year, the funds will roll forward into the SGA pool account.*

Co-Sponsorship Form

***Note:** Although it is possible to transfer funds from one SGA recognized organization to another, it is not the preferred way for organizations to collaborate. If multiple organizations wish to hold an event or work on a project together, it is much faster for the organizations to divide the costs and pay for one or more aspects with their own funding. For example, one organization could pay for the catering expense, the other for the speaker cost, another for travel, etc. If there is no possible way of dividing the costs in this manner, please see below for the co-sponsorship guidelines.*

Co-Sponsorship Forms are used to transfer money from one SGA organization to another. Please note that transfers cannot be made to or from any Academic Departments. Some examples of use include co-sponsorships for events or purchasing an advertisement from a student publication. It may take up to three weeks or longer for a transfer to appear in an organization or department budget. Please plan accordingly.

When submitting a Co-Sponsorship form:

- Make sure the account numbers on the Transfer Form are accurate and **legible**. Incorrect or illegible account numbers could lead to funds being withdrawn or deposited into an incorrect account.
- SGA allocated funds may only be transferred between recognized and funded student organizations. SGA allocated funds may **not** be transferred to an academic department's account for any reason.
- You must submit documentation outlining the actual purpose of the transfer. This form will **not** be processed without additional documentation outlining a specific expense.
- Until your account is credited with the transfer, these funds may not be used.

Remember:

- Keep a copy of all paperwork submitted for your records.
- Always complete all required information on submitted paperwork.

Print/Copy Orders

Print/Copy Orders can be made to commission work done at Emerson's Print/Copy Center, including letterhead, envelopes, printer paper, bulk copying, and custom printing jobs. There are three separate forms, each for a specific set of services. Copies of these forms may be picked up in the Print/Copy Center.

When to use each form:

- The Copying Services form is used for bulk copying jobs or smaller custom orders.
- The Custom Printing form is used for larger, specialized printing projects.
- The Stock Printing form will allow you to order customized letterhead, envelopes, note cards, and business cards. Please note stock printing may only be ordered for an entire organization, not specific members.

The specific form must be filled out completely, including the organization's account number and an exact description of the job requested. The employees at Print/Copy will assist you if you explain that you are placing an order for an organization and tell them your organization account number.

Remember:

- Reimbursements will not be processed for Print/Copy charges. Always fill out a Print/Copy Order form and use your organization account number for charges.
- Keep a copy of all paperwork submitted for your records.
- Always complete all required information on submitted paperwork.

Contact Information

Emerson Print/Copy Center

emersoncopy@gmail.com

617-824-8593

Hours

Monday–Friday

8:00 am–5:00 pm

98A Boylston Street

Boston, MA 02116

Staples Orders

Emerson College, including SGA, uses Staples exclusively for ordering office supplies through their Staples Business Advantage program, which offers a discount of about 45% on supplies.

To place an order from Staples, go to Staples.Com and load a shopping cart with the items that you want to purchase. Click checkout, which will load a summary of your shopping cart. Take a screenshot of this page and send it to both the [SGA Executive Treasurer](#) and the [Associate Dean of Students](#). Within 5 business days, the order will be placed for you. All orders will be delivered to the Office of Student Life. The Student Life Staff Assistant will alert the organization when the order has arrived.

Staples is to be used for the purchase of office supplies only. Computer equipment, paper, and anything that requires electricity should be purchased through the appropriate vendor.

Food/Catering Orders

Sodexo Catering

One of the most convenient means of providing food at an event is to utilize the College's on-campus vendor, Sodexo. When placing an order with Sodexo, visit the Catertrax website at <https://emersoncatering.catertrax.com> at least two weeks in advance to select your menu, obtain prices and check availability of certain menu items. You must also provide the date, time, and location of the event that is being catered, along with your organization account number. Consult with Property Management as to whether food service is permissible in your venue. For menu assistance, contact Sodexo at 617-824-8065 or by [email](#). Also, you may consult the catering/student catering menu, which is available online at

<http://www.emerson.edu/about-emerson/offices-departments/business-services/dining-catering-services/catering>.

Please note the following process to be used when ordering Sodexo :

- Go to the Catertrax website – <https://emersoncatering.catertrax.com>
Please note: Only Organization Presidents and Treasurers may manage and place orders on the Catertrax website.
- Register yourself as a new user.
- You can then “Create New Catering” by clicking on the green box to select your items.
- Select and confirm your items; enter your customer and event details; review your order and then check out.
- When you checkout, you will be asked to supply the email of your budgetary authority to approve the order. For all SGA recognized student organizations, you MUST send your catering order approval request to the following: The President/Treasurer and Advisor of your organization, the SGA Executive Treasurer (SGA_Treasurer@emerson.edu) and to the Associate Dean of Students, Sharon_Duffy@emerson.edu . If this procedure is not followed, your order will NOT be processed or approved.
- When you submit your order, you will receive an email confirmation, as does the approval manager you named as the budgetary approval sources.
- An order will be denied if the organization's budget cannot handle the charges as outlined in the order, or if the event you are hosting is not an approved event.
- SGA organizations may not purchase bottled water or alcohol.
- If you experience any problems in your service/order, it is your responsibility to alert the [Associate Dean of Students](#) within 24 hours of your event, otherwise, we must

assume your order was fulfilled and we will authorize immediate payment.

- Keep a copy of your email order for your records.
- If you are looking for a custom order, or want to order items off the posted menus, you will need to contact the Catering Manager directly to place an order. The same would go for discussing price adjustments for “out of the ordinary” orders.
- You can cancel orders within 48 hours of the event without being charged for the event.
- You must place your order at least 5 days in advance of the event. When you select your date, you may find the date to be highlighted red, yellow or green. Red meaning they cannot accept your order; Yellow meaning you must call the Catering office to see if they can accommodate your date given the late notice; or Green meaning your order can be processed as usual.
- There is a tutorial at <https://emersoncatering.catertrax.com/shoptutorial.asp?intOrderID=&intCustomerID=%28%7C> if you need additional help with making Sodexo orders.
- Reimbursements will not be processed for Sodexo charges.

Trip Protocol

Before embarking on any organization-sponsored off campus trip (such as a conference, retreat, or film shoot), the following must be completed.

At least one month prior to departure:

- Inform the [Associate Dean of Students](#) about your travel plans. There may be specific steps you need to take in addition to the tasks below.

At least two weeks prior to departure:

- A Trip Registration Form and participant list (ID #, last and first name of all interested in participating, including advisors) must be turned in to the Office of Student Life. This form is available in the Office of Student Life.
- All financial paperwork (Purchase Orders for travel, Cash Advances, etc) must be submitted. This is with the exception of reimbursements, even if you pay for the travel in advance and out of pocket, which are to be submitted after you return from the trip.

At least 72 business hours prior to departure:

- A signed Assumption of Risk and Release Form for each trip participant, including advisors, and a complete list of participants with ID numbers must be turned into the Office of Student Life. This form is available in the Office of Student Life.

Trip Financial Policies:

- As per the College established per diem rate, each individual may spend up to the following amounts on food per day:

Breakfast ~ \$13.00

Lunch ~ \$20.00

Dinner ~ \$38.00

This is the maximum amount that may be reimbursed. It is advised that students not be excessive with the spending of their per diem allowance. Organization Treasurers are responsible for encouraging fiscal responsibility.

- Reimbursement receipts for meals must be numbered and accompanied by a list of people who dined together, and stapled or paper-clipped to the back of the Reimbursement Request Form.
- SGA Funds cannot be used for the purchase of alcoholic beverages.
- Transportation and lodging expenses should be itemized showing itinerary, mode of transport and/or location. These expenses should relate only to expenses which

cannot be processed by the Purchasing Department. Employees should refer to the College's travel policies to ascertain whether or not these expenses must be arranged with the Purchasing Department.

- All other expenses are also to be itemized, with a brief description of the nature of the expense.
- Cash advances taken by advisors must be reconciled within five (5) business days after use.
- The College follows the IRS standard mileage rates when reimbursing for business related expenses. See:
<http://www.irs.gov/uac/2013-Standard-Mileage-Rates-Up-1-Cent-per-Mile-for-Business,-Medical-and-Moving>
- Emerson College has an account with National and Enterprise to rent cars using a Purchase Order. In order to process a Purchase Order for a rental car, please visit the website below to price out your intended rental. Use the "Direct Bill" option. Fill in the information as if you were booking the car and fill in "TBA" for the Purchase Order number. You will get a price quote for the rental. Take a screenshot or print out this price quote and attach it to a Purchase Order request form, get the necessary approval signatures and submit it. Once a Purchase Order number is assigned by the College, a copy of the Purchase Order will be emailed to you and then you will need to go back to the URL where you got the price quote, re-enter all the information for the rental and enter in the Purchase Order number you received where you had noted "TBA" when securing the quote. At this point, the booking is confirmed and you will be all set to pick up the rental car. The rental company used by Emerson College requires students to be at least 21 years of age to rent a vehicle. Here is the URL:
http://www.enterprise.com/car_rental/deeplinkmap.do?bid=028&refId=EMERCOLL
- If you are unsure of what SGA funds will cover on a trip, please contact the SGA Executive Treasurer prior to submitting any financial paperwork.

Contracts

Contracts are used to bind vendors and non-Emerson individuals to services offered in exchange for payment. These are necessary to protect student organization's funds.

Contracts must include the following:

- Date, time, and location of the event/service
- Type of event/service
- Amount being charged
- Contact information including mailing address
- Valid Social Security Number or Tax Identification Number
- Proof of Commercial/Business Liability Insurance or signed Liability Waiver
- Completed and Original Signed W-9 form (see Appendix)

Processing guidelines for contracts:

All contracts must be pre-approved by the Office of Student Life and the Dean of Students before services are rendered and before the SGA Executive Treasurer will process any paperwork.

Contracts must be signed by the Associate Dean of Students and Dean of Students. The original contract must be signed by the consultant/company. No contracts may be signed by a student or an advisor! A student/advisor is not an agent of Emerson College or the Student Government Association. A student/advisor signed contract is NOT binding to Emerson College or SGA.

A minimum four-week turnaround time is required for review of all contracts submitted. Please plan ahead when using contracts.

See the Off-Campus Events policy in the *Student Organization and Advisor Resource Guide* for contracts involving the use of off-campus venues.

Note: *All contracted speakers/performers/guests of the College must provide proof of insurance liability (this does NOT mean we ask for proof of Health Insurance) or sign an insurance waiver with the Office of Purchasing and Risk Management BEFORE services may be rendered. A guest may not perform or speak on campus without compliance of this policy. Contact the [Associate Dean of Students](#) with any questions.*

Print Publication Bids

The following is the process all SGA Print Publication groups should follow to secure publication bids:

- Meet with your group and with your advisor to develop the specs as requested the Print Publication worksheet (see Appendix). The more detailed and complete you are in expressing the vision of your project, the better the vendors will be in providing you with options and costs associated!
- Email the completed worksheet to [Kathleen Duggan in Purchasing](#), the [Associate Dean of Students](#), the [SGA Executive Treasurer](#), and your advisor. Kath will distribute to the print production vendors of the College. If you want to request a bid from a specific vendor, feel free to include that in the "Other Special Instructions" section.
- Kath will provide us with the prices as quoted by the various vendors when they are received. Please plan in advance and build in time for this to occur!
- Evaluate your budget, priorities and vision for your publication. You will then need to select a vendor within 30 days of receipt of the bid summary as the bids are only valid for 30 days. Once you select a vendor, you can make minor edits to the specs as quoted, but they may be costly.
- Work with your President/Editor, Treasurer/Business Manager and advisor to complete a PO request form and the SGA Executive Treasurer and we will take it from there! After the PO is assigned, you can give your selected vendor your disks and files and begin production!
- When you receive the final product, please send a copy to the Associate Dean of Students in the Office of Student Life for historical purposes. This will also serve as a confirmation of the completed order so the PO can be released for payment to the vendor.
- Be advised that the last day of class each semester is the deadline to submit any and all paperwork and ALL services must be received by the last day of finals in order to be paid out of the current fiscal year. Please plan in advance and accordingly.

Film Shoots

All Emerson College students must adhere to the policies and procedures associated with shooting film/video and/or recording audio and for securing permission to do so on Emerson College Property, Public Property, Non-Emerson College Private Property (Request for Certificate of Insurance) and in the Tufte PPC Studios or Journalism TV Studio. Any revisions to the Shooting Policies and Procedures and forms may be found at the TRF web site: www.emerson.edu/trf - select "Policies/Forms."

At least two weeks prior to a location shoot students should submit the appropriate permit request to Timothy McKenna, Equipment Distribution Center Manager, for processing. These policies and procedures apply to student organizations, The Emerson Channel, Emerson Productions, faculty, students and staff.

Note: *Location film and video production carries risk. While you may make every attempt to exercise safety precautions on a location shoot, you may be held legally and financially liable in the event of an accident that happens as a result of that shoot.*

- The College does not provide insurance for equipment on loan from the Equipment Distribution Center (EDC).
- The College does not provide insurance on equipment rented outside the College.
- The College does not provide workman's compensation insurance for talent including members of SAG and AFTRA.
- **This is your financial responsibility.**

Penalties:

Violations by students of the following policies and procedures may result in:

1. Suspension of production activities.
2. Formal charges and disciplinary action by the College as outlined in the Student Handbook.

Shoots that Require Special Permission:

- Shoots that require the use of firearms (real or prop), smoke or fog machines, live animals, or young children require special additional permission.
- Shoots that require access to buildings or locations after hours may require special additional permission.
- Timothy McKenna, Equipment Distribution Center Manager, TRF, (617-824-8349), can provide procedures that outline requirements for these special requests.

Other Available Services

Copy Machines:

There are copy machines located on the lower level of the Campus Center at 150 Boylston Street for the convenience of SGA funded organizations. All recognized organizations are assigned a copy code by the Office of Student Life that allows access to these machines. The organization's SGA account is charged directly for any copies made under this copy code. Copy codes must be signed out in the Office of Student Life after your organization reactivates. Personal use of copy machines using an organizations' copy code is not permitted. SGA reserves the right to freeze an account for abuse of copy machine privileges. Any individual found responsible for misusing copy privileges will be subject to disciplinary action. SGA will not reimburse you for using your personal print credits for an organizational expense, no exceptions.

Equipment/Furniture/Office Supplies:

All equipment, furniture, and supplies purchased or received by an SGA organization remain the property of SGA and Emerson College. Contact the Office of Purchasing and Risk Management directly for assistance with obtaining furniture or contact the Information Technology Department for computer and/or equipment purchases. Only organizations with approved office and/or storage space will be allowed to purchase furniture and/or computers/computer equipment or supplies. No organization may trade or dispose of equipment without permission from SGA and the Associate Dean of Students. Organizations must keep an up-to-date inventory of all equipment and furniture in their possession and submit it during Financial Advisory Board process, including all computer and telephone equipment. Furniture and technical equipment is for organization use only, becomes property of Emerson College, and may not be used for personal reasons. In the event that an organization becomes inactive, all property reverts to SGA ownership. No organization equipment may be stored in a student's residence hall room or apartment during College breaks.

Telephone:

Organizations that have on-campus office space that allows for setup of a telephone line may do so by contacting Telecommunications at x8585. Telecom will require pre-approval from the Associate Dean of Students, who will require acknowledgement from the organization Advisor that such service is necessary and that the Advisor is willing to monitor monthly telephone bills. Please be aware that there is a monthly charge for phone service as well as an equipment charge for the telephone handset of \$22.50 (subject to change) per line, per month, not including calls. The monthly phone charge is applied even

if the telephone is not used and during summer and winter breaks. For long distance calls, a long distance code must be assigned. Contact the Associate Dean of Students to inquire about obtaining a long distance access code. Telephone charges are billed directly to the organization's account and are supervised by the SGA Executive Treasurer and the Associate Dean of Students. Organization telephones are for business use only. Misuse of phone privileges by any individual is grounds for disciplinary action.

Sending Mail & Packages:

All mail and packages must include the organization's account number in the upper left hand corner. It can then be placed in an Emerson mailbox or brought directly to the main mailroom on the Lower Level of 100 Boylston Street. The organization's account is charged directly by the mailroom. For postage totaling over \$50, the SGA Executive Treasurer's approval is required on a Transfer Form. It is recommended that you keep track of any mailings you make to avoid being over or under charged. For large mailings, it is advised that you bring a sample of the mailing to the mailroom to be weighed.

Computer Equipment:

All computer equipment purchases by student organizations must be made through the College's Technology Analyst, who can be reached at the Computer Help Desk (x8080). The Technology Analyst will be able to assist with determining your organization's computer needs and securing the appropriate equipment at the most competitive rates. Only organizations with College allocated office space will be able to purchase computer equipment.

Room Reservations:

[SpaceBook](#), Emerson's online space reservation system, is now open and available!

Use it to:

- Browse existing events
- Check space availability and room details
- Request space for events, meetings, rehearsals, and study
- Track and modify existing reservations

For a [list of rooms](#) available through SpaceBook and additional information on planning your next event, visit www.emerson.edu/eventresources. Then log in to [SpaceBook](#) with your Emerson account to get started. Read the [How-To Guide](#) for detailed instructions.

Note: Requests for function rooms will no longer be taken through OneStop (x8880). OneStop will continue to be used for Facilities work order requests.

Have a question? Contact the appropriate [space manager](#).

Office of the Arts Managed Spaces:

The Office of the Arts operates several of Emerson College's performance facilities on campus including the Paramount Black Box, Bright Family Screening Room, Paramount Studios and Semel and Greene Theatres. These spaces are available for student use and the application procedure will be posted online in the fall and spring. Availability is limited and priority is given to the academic needs and Office of the Arts programming. Student use requires the presence of a Technical Supervisor at the project's expense, and based on the nature of the project, the Office of the Arts may require additional staffing as well. Student organizations may request the use of an Office of the Arts Managed space by submitting an application to the Associate Dean of Student. Contact the Associate Dean of Students for more information or assistance. For Office of the Arts Managed Space Application, go to <http://www.emerson.edu/about-emerson/offices-departments/office-arts/venue-inquiries>

Media Services:

If your organization should require A/V equipment for an event, you must indicate this when placing your reservation order with One Stop. Once your reservation has been confirmed, a member of the Media Services Staff will contact you regarding your specific needs. Please note that equipment needs for non-course related events will be charged to your organization's account. A complete listing of services and special student rates is available online at http://www.emerson.edu/library/media_services/.

SGA Appeals

While organizations are encouraged to use their allocated funds and seek out additional co-sponsorships from other organizations and departments, a need for greater funding arises from time to time. SGA recognized organizations may appeal for funds if the organizations meet the given criteria.

If you have any questions, please do not hesitate to contact the [SGA Executive Treasurer](#) at who will assist you in preparing your SGA Appeal, if necessary.

Warning: *Keep in mind that even if your organization decides to submit an SGA Appeal packet, you are never guaranteed the amount you are appealing for. There is a limited amount of money in the SGA Appeal account each school year, and therefore SGA reserves the right to deny any SGA Appeal that does not meet the listed criteria. It is expected for your organization to only submit an SGA Appeal as a last resort:*

- First Resort: Reasonable cost cutting.
- Second Resort: Re-prioritizing your Organization's budgeted funding allocation.
- Third Resort: Independent Fundraising.
- Fourth Resort: Co-sponsorships from departments and organizations.
- Fifth Resort: In-kind donations.
- **Last Resort: Submitting an SGA Appeal packet.**

In the past, there have been fundraising and co-sponsorship minimum requirements for submitting SGA Appeals. Those minimum requirements have been removed. It is important to keep in mind that SGA Joint Session officials expect organizations to consider submitting an SGA Appeal packet a last resort.

Acquiring co-sponsorships, donations, or fundraising prior to submitting your SGA Appeal packet will make your appeal look more attractive to the SGA Joint Session officials. If your organization has no co-sponsorships, donations, or fundraising, it will be difficult for you to make the case that your organization has exhausted all other possible ways of getting additional funds (which is the first criteria that SGA Joint Session officials will be looking for). Any organization that has an SGA Appeal denied is welcome to submit a remade SGA Appeal packet after obtaining co-sponsorships, donations, fundraising, or after going through and cutting costs.

SGA Appeal criteria:

When judging appeals, SGA Joint Session officials are looking for the following:

- The organization has exhausted all other possible ways of getting additional funds.
- The appeal is financially responsible.
- The appeal shows proof of planning ahead.
- The appeal benefits the college community outside of the organization as well as the students directly involved.
- A similar appeal has been made by the organization in the past, and has consistently lead to a successful event, trip, etc.

Who may submit an SGA Appeal packet:

Only SGA recognized organizations, recognized campus chapter Greek organizations, Alternative Spring Break, ERA Awards, and the EVVY awards may submit an SGA Appeal packet. If individuals or groups who are not officially recognized SGA organizations wish to appeal, they must have an official SGA recognized organization be their sponsor and assume responsibility for the project.

Submitting an SGA Appeal:

1. You must contact the [SGA Executive Treasurer](#) at least four weeks prior to the date in which you need the funds in order to receive an SGA Appeal packet. The SGA Appeal packet will include all pages which need to be returned, instructions for filling out the SGA Appeal packet including additional information that is needed to be attached, and several pages relating to co-sponsorships, fundraising, and budgeting which will need to be filled out completely and returned to the SGA Executive Treasurer.
2. The organization must complete and return the SGA Appeal packet to the SGA Executive Treasurer at least three weeks before the funds are needed. This timeline does not include processing time for SGA paperwork such as Purchase Orders and Check Requests, so if applicable please take that processing time into consideration.
3. Once you submit the SGA Appeal packet to the SGA Executive Treasurer, it will be reviewed. If the SGA Appeal packet is accepted, the SGA Executive Treasurer will work with the SGA Executive President to set an SGA Appeal hearing date. The SGA Appeal hearing will be during an SGA Joint Session meeting (*Tuesdays 2:00-3:45 PM*). Keep in mind that SGA Appeal hearings are subject to time constraints of SGA Joint Session meetings. Every effort will be made for your organization to present their appeal on their scheduled date, but may be postponed based on time. All appeals will be heard in the order in which they were received. Please note that the last day appeals will be heard is the second to last SGA Joint

Session meeting of the semester

4. Once the hearing is scheduled, the SGA Appeal packet will be forwarded to the Joint Session. If there are any inquiries regarding your appeal prior to the hearing, you will be contacted by the SGA Executive Treasurer. On the day of your SGA Appeal hearing, you will be given time to make a presentation. Then the SGA Joint Session officials will ask you questions (called inquiries) and sometimes speak in favor or speak against your appeal. There SGA Join Session officials will then place their votes whether or not to grant your SGA Appeal.

Note: *Remember that SGA Appeals are heard in the order in which they were received. SGA Joint Session officials are asked to look at each appeal on a case by case basis and not allow upcoming appeals or potential future appeals to influence their decision. That being said, SGA Joint Session officials will be looking for organizations to practice fiscal responsibility and consider the impact that their appeal will have on the SGA Appeal account while submitting their SGA Appeal packet. If the SGA Appeal account hits \$0.00, all upcoming SGA Appeal hearings will be cancelled and no further SGA Appeal packets will be accepted.*

After an SGA Appeal is granted, you will work with the SGA Executive Treasurer and Associate Dean of Students to develop a plan for the SGA Appeal funds. Please note, funds from the SGA Appeal will NOT be transferred into your organization account. Rather, you will submit paperwork noting "SGA Appeal" in order to access these funds.

Financial Advisory Board (FAB)

Please note: It is pronounced "F-A-B," not "Fab."

The Financial Advisory Board (FAB) is a body of students charged with reviewing all requests for yearly funding by SGA organizations. Each Spring, FAB reviews budget proposals from each SGA-funded organization and recommends allocations for the upcoming academic year to SGA. This is the only time during which SGA-funded organizations can be considered for annual funding.

Digital FAB packets will be made available to organization Presidents and Treasurers shortly after spring break. It is essential that your organization participates in the FAB process. If you choose to not participate or turn in paperwork late, your organization may not receive funds for the upcoming school year.

The Board is comprised of the SGA Executive Treasurer and Vice Treasurer, a class council representative from each class, and the SGA Advisor. Every effort is made to select members do not have a conflict of interest in Treasury proceedings when budgets of student organizations are concerned. An invitation to participate as a member of FAB is at the discretion of the SGA Executive Treasurer and is approved by the Associate Dean of Students.

Duties of FAB:

- Meet with and review all student organizations requesting funds during the organization hearing process.
- Investigate any SGA-funded organization whose budget is suspended and make a formal recommendation to SGA.
- Make long-term financial policy recommendations to the SGA on such issues as criteria for funding, fee increases, and vendor dealings.

What FAB takes into account when determining funding amounts:

- Whether the numbers provided in the packet are concrete and well-researched.
- Number of active members and outreach to multiple majors.
- Benefit of organization's proposed budget spending to the student population.
- Ability to spend funds wisely and responsibly.
- Spending (actual and anticipated) that support the mission and purpose of the organization and of the College.
- The quality and preparedness of the organization's hearing (if the organization

chose to have a hearing).

- Attention to detail and specifics in the packet.

Each organization is responsible for completing their FAB packet on time. Specific information will come during the Spring semester, so be prepared for it. Only submit your FAB packet digitally. In addition to the electronic packet, each organization must submit a hardcopy of their Authorized Signature Sheet by the given deadline.

The following must be included in your Financial Advisory Board packet:

- Your Organization's Constitution.
- A brief cover letter describing your organizational infrastructure, how your organization benefits the Emerson community, and any other key information you feel FAB should be aware of when making their recommendation.
- A detailed budget outline of expenditures for the previous fiscal year.
- A detailed budget outline of expenditures for the upcoming fiscal year.
- An all-inclusive inventory, including a technical equipment record, listing equipment type, brand, model, and approximate date of purchase.
- A list of summer contact information.
- A list of your organization's officers with addresses, telephone numbers, and email addresses.
- A list of your organization's active members, including the number of undergraduate and graduate students.
- A list of authorized signatures for the next fiscal year (hard copy).

Please note, the packet requires the signatures and contact information of the officers for the next school year. Please plan your elections before the FAB packet is due, if possible, so you will be able to submit this information. Otherwise, it is your responsibility to submit this information to Student Life once you hold your elections.

Additional Information

It is the sole responsibility of the organization to follow the allocation process correctly. FAB reserves the right to penalize any SGA funded organization for failure to provide a complete and thorough accounting of its request.

If your packet has not been submitted, you will not be offered a hearing with FAB. These hearings are highly encouraged; they give student organizations a prime opportunity to professionally present themselves to ensure that the Board makes an educated decision regarding the organization's annual funding. It is recommended that one incoming and one

outgoing officer attend the hearing. The organizations that prepare for their hearing greatly increase their chances of receiving their requested budget. Please note, failure to keep your scheduled meeting time may result in financial penalization.

The SGA Executive Treasurer is available to answer any questions about the allocation process. FAB Packet Workshops will be held in the Spring semester by the SGA Executive Treasurer to aid organization Presidents and Treasurer's in the FAB process and how to fill out the paperwork necessary to participate in the FAB process.

Upon review, FAB will create a budget proposal and submit it to the Student Government Association Joint Session, which will review and vote on the proposal before the end of the spring semester. Notification letters will follow this decision.

FAB Financial Responsibilities

FAB has no set time limit to conduct investigations of any concerns relative to fiscal matters and reserves the right to notify the Dean of Students regarding any suspected improprieties.

Past reasons for suspension of funds include: misuse of funds, personal use of funds, misuse of phone, storing organizational equipment at off campus residences or in the residence halls, falsifying documents (e.g. forgery of signatures) and knowingly providing false information to the FAB. Spending that is inconsistent with an organization's purpose as stated in its constitution is prohibited. If you have any questions regarding the use of your funds you should contact the SGA Executive Treasurer.

Appeal Process for FAB:

It is not guaranteed that your organization will receive the full amount it has requested. The Board will often penalize an organization's budget allocation by a certain percentage if the packet is incomplete, if the numbers do not add up, and/or if there is a lack of detail. There are not enough funds collected by the Student Activities Fee to meet all the requests of the 90+ SGA approved organizations on campus, which is the primary reason why most organizations are not allocated their full requested budget. Furthermore, the Board does not compare organizations when allocating funds; a larger budget allocated to one organization does not reflect on a like organization that may have received a smaller budget.

If an organization feels that their budget was not given full consideration or that the amount it was allocated is not sufficient, the organization may submit an SGA Appeal for more funds the following academic year. See the section on SGA Appeals for more information.

Additionally, FAB will often not allocate funds for trips and speakers, due to the impossibility of predicting travel expenses or ensuring a speaker so far in advanced. If your organization was not granted funds for big expenses such as these, or if your projected costs turn out to have been too low, organizations are welcome to submit an SGA Appeal to receive additional funds. If this is a repeated trip or event, funds may be granted during the initial budget allocation.