Student Government Association
Student Organization Financial Handbook

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Introduction

This Handbook is a resource written to assist student organizations with understanding the financial policies and procedures for student organizations at Drury University. It is designed to be a comprehensive reference to student organizations on how to open an account, receive funding, spend and deposit your money, and manage your account.

This handbook is divided into five sections:

1) An explanation of the different types of accounts and funds, and the procedures for opening a student organization account.
2) Description of how to obtain funds – commonly referred to as the "Allocation or Slating Process."
3) How to manage your funds and maintain your student organization's account.
4) Budgeting Guidelines – generally accepted guidelines that SGA uses to make decisions regarding allocations
5) Appendix – FAQ and supporting materials to assist your student organization

For more specific information on how to register, renew, or revive a student organization; or general information about student organizations, please contact Andrea Battaglia in the Student Organization Office at abattaglia@drury.edu or 873-6854.

For more specific information on how to request funding from the Student Government Association or how to complete and submit your student organization's audit, please contact the SGA Advisor, Matt Battaglia, at mbattaglia@drury.edu or 873-6871.

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SECTION I – Your student organization account

The Student Fee Treasury is funded by an annual Student Activity Fee paid by every full-time, day-school student at Drury. For the 2009-2010 academic year, the fee will be $269.00 per student. Drury assesses this fee in conjunction with the Student Government Association (SGA) that covers a small portion of the operating costs of the Findlay Student Center, the Barber Fitness Center, and the President's Council for Sustainability. The remainder of the money is allocated to student organizations and special projects by SGA such as the USA Today Collegiate Readership Program. Through the Allocation Process (described in Section II), student organizations in good standing may request money from SGA to fund their activities and programs.

<u>Types of Accounts</u>

Drury University has two types of accounts through which money is spent: Budgeted and Non-Budgeted.

Budgeted accounts are expenses that are budgeted for, through which every department on campus spends its money. Student organizations should <u>not</u> keep money in these accounts as they are departmental accounts and are closed out each year so any unspent budgeted money for the operating year is lost.

Non-Budgeted accounts hold the personal monies of any student organization and are similar to a bank checking account in that the money "rolls over" from year to year and the account does not close. According to Drury University procedures, all financial transactions for student organizations must be processed through the university account. This means that student organizations may not keep their money in an account at another institution such as a bank or credit union. Drury's Business Office will post all transactions to your account and provide your group with statements on request.

<u>How to Open an Account</u>

To open an account, a student organization must first be recognized and approved by the university. Please contact the Student Organizations Office (FSC 120) for information on how to be recognized and approved. Once approved, the Student Organizations Office will help the group submit the proper form to Jill Holmes in the Business Office to request an account be set up. The group's Campus Advisor should be the one who requests the account.

<u>How to Obtain Your Statements</u>

There are two ways to obtain your student account statement: request a copy from the Business Office during normal business hours or request a print out from your campus advisor. Every campus advisor should have online access to view their account. Access is granted by Jill Holmes in the Business Office.

Understanding Your Account

Beginning in fiscal year 2009-2010, student organization accounts are in the following format: 141.xxxxx.000. The account will begin with “141” and designate the account as a non-budgeted account. The next 5 digits will be unique to each student organization and designate that organization. All transactions, revenue, and expenses will flow through this one account.

Each new fiscal year, the money left rolls over to the next year.

When transactions are posted to your organization’s account, it is important to remember that money coming into your account (income) is posted as *negative* numbers and money going out (expenses) is posted as *positive*.

SECTION II – Obtaining funding (The Allocation Process)

Student Organizations in good standing may request funding from SGA. The procedure for requesting money is very specific and should be planned for well in advance.

Step 1 With the help of your Campus Advisor, plan an operating budget based on your organization's planned activities for the academic year.

Each group plans their budget differently, but generally it is a good idea to have a brainstorming session early in the year (or the previous year) to gather input from all your officers or members. Be specific in what you want to do and research costs for travel, special events, and supplies. Be realistic – remember that there are a lot of other groups asking for money as well and SGA does not look favorably on artificially inflated budgets. When possible, collaborate with other groups or departments. See the Budgeting Guidelines and sample Budget Request in this handbook for more information.

Step 2 Present your budget request to the SGA Finance Committee.

Each semester the Finance Committee of SGA will schedule Slating meetings for student organizations to request funding. This schedule will be available on the SGA website, www.drurysga.com, as well as emailed out to students, faculty, and staff. Reminders will be sent out via email approximately one week before Slating meetings. Student organizations wishing to request funding will be required to sign up at the Dean of Students' Office. At the designated time, each student organization should send at least one representative to present their budget proposal and bring 10 copies of their request for the Finance Committee. See FAQ for what else to expect during a Slating meeting.

Budget Request Submission

- Requests should be detailed and outlined as shown in the sample Budget Request in this handbook.
- Requests must be accompanied by an oral presentation during the Slating meeting by the student organization's president or designee and should not exceed 5 minutes.
- The presentation should give a brief overview of the organization's goals and objectives for the year, outline their budget request, and explain the rationale for the amounts requested.
- Following the oral presentation, the presenter should be prepared to answer questions about the proposal. See FAQ.
- If an organization is not present for their assigned meeting time, the committee will decide their slate based solely on information provided in the proposal.
- Campus Advisors may be present and answer questions, but should not be extensively involved in the student presentation requesting funds. It is

appropriate that requests for such funding be articulated by students due to the fact that funds are being allocated from the Student Activity Fee.

The role of the Finance Committee is to oversee all issues relating to the Student Fee Treasury. It is their duty to slate business concerning the allocation and distribution of student fees (i.e. – "Slating"). Furthermore, the committee is always available to assist all student groups and organizations in the allocation process. As part of this, the committee shall establish guidelines for allocations, communicate to student organizations the necessary procedures for the allocation process, and hold appropriate training workshops or informational sessions as needed. The student fees that are allocated through SGA are a privilege awarded to organizations that truly benefit the entire student body, demonstrate a financial need, and fulfill all of the requirements as set forth by Drury University, SGA, and the Finance Committee.

<u>Step 3</u> Your request is allocated by SGA.

One week after Slating, all budget requests will be voted on by the entire SGA General Assembly. At this time the Finance Committee will communicate their recommendation to the Assembly, discussion among SGA representatives will occur, and your request will be voted on. It is typical for organizations to not receive their full requests due to budgetary constraints and other requests falling outside the guidelines. The General Assembly meetings are always open to all students, but it is not necessary for your group to attend.

<u>Step 4</u> Your group is notified of their allocation.

Your group will be notified typically within two business days of its allocation. This notification will be emailed to the student contact and to the organization's Campus Advisor. An explanation will be given if you did not receive your full request. If the student organization believes their allocation was decided in error, and meets the qualifications for an appeal, then they are welcome to follow the appeal process as outlined in this handbook.

<u>Step 5</u> The allocated money is transferred to your organization's account

Following allocations, the VP of Finance will notify the Business Office of the approved amounts to be transferred typically within two business days. Please note that it may take a couple weeks for the money to show up in your organization's account. Once you receive notification from SGA of your allocation, it is not necessary to wait for the money to post to your account to start spending your money.

SECTION III – Managing your funds

Depositing Money

SGA allocations are automatically deposited into your account as explained above. If you group receives any other money from fundraising, membership dues, or outside donations, simply take the deposit to the Business Office with your organization's name and account number. All checks should be made out to "Drury University" and your organization should be listed in the memo along with the student's ID number when applicable (e.g. – dues).

Spending Money

Please remember that Drury is exempt from sales tax. Purchases for all student groups should not include sales tax. You may obtain copies of the Drury Tax Exempt Letter from the Student Organizations Office, FSC 120. If you do not use the Tax Exempt Letter, you will not be reimbursed for the sales tax you paid.

All financial transactions for student organizations must be processed through the university account. Do not under any circumstances pay bills directly with cash collected for dues, social assessments, income projects, etc. Typically, expenditures are paid in 1 of 4 ways: Request for Check, Invoice Payment, Petty Cash Request, or Drury Credit Card. Check request forms and petty cash request forms are available in the Office of Student Organizations (FSC 120) or on the Drury website.

Check Request Instructions:

1. Fill in the date of request and leave the vendor number blank.
2. Complete the reimbursement amount and fill in the budget account number.
3. Total the reimbursement amount and attach itemized receipts or a copy of a contract for future events for purchases made.
4. Indicate the person/vendor to which payment is being made. An address is required for all payees.
5. Describe the nature of the purchase in the Describe and Check Stub Description areas.
6. "Requested by" is the signature of the person filling out the form
7. "Account administrator" is the signature of the Campus Advisor or the person that has access to view the group's budget.
8. "Appropriate vice president" is usually the Dean of Students; if you are unsure, ask your campus advisor for this information. (To speed up the check request process, get the VP signature before submitting the check request to the Business Office).
9. Select "Hold Check for Pick-up" or "Mail To" for check distribution. Checks will not be sent through campus mail.
10. Checks submitted by Thursday will be ready to pick up after the following Thursday.
11. Make a copy of check request forms and receipts for your records, the copy submitted to the Business Office will not be returned to your organization.
12. Record the disbursement (including the check number) in your cashbook to help with future auditing procedures.

13. More information regarding check request procedures can be found online through the Drury website.

Invoice Payment Instructions:

1. Original Invoice is preferred; if original invoice is not available, have your campus advisor contact the Accounts Payable (417-873-7389) department to discuss alternate options.
2. Fill in the budget account number.
3. The account administrator should sign the invoice.
4. For invoices more than $1000, the signature of the appropriate Vice President is also required.
5. Make a copy of the invoice your records, the copy submitted to the Business Office will not be returned to your organization.
6. Record the disbursement in your cashbook to help with future auditing procedures.

Petty Cash Instructions:

1. Fill in the date and the amount of the request. Petty cash requests are limited to $75 per day per account number.
2. Attach the itemized receipt.
3. Indicate the person/vendor to which payment is being made.
4. Describe the nature of the purchase in the "for" section.
5. Account administrator should sign in the approval area. If the petty cash request is paid to the account administrator, the appropriate vice president's signature is required.
6. Make a copy of petty cash request form and receipts for your records. The copy submitted to the Business Office will not be returned to your organization.
7. Record the disbursement in your cashbook to help with future auditing procedures.

Credit Card Instructions:

Your Campus Advisor may be able to check out a Drury University credit card through their department. This is particularly helpful for a period when many large expenditures take place. All normal spending procedures apply; however, all receipts must be turned in along with the credit card through your Campus Advisor. He or she will be responsible for submitting the appropriate paperwork.

<u>Tracking your budget</u>

It is imperative that each student organization keeps track of their budget:

- To properly plan for future expenditures
- To improve the efficiency of the organization
- To catch accounting errors or charges that were incorrectly posted
- To be prepared for the SGA audit
- To learn “real world” experience

Depending on the size of your organization and the frequency of your expenditures, there are a number of ways to track your organization's budget:

- The preferred method is to use Microsoft Excel or another spreadsheet program. This method works well for almost any small to medium sized organization. If you need help getting started, email the Student Organization Office at getinvolved@drury.edu and request the "Student Organization Budget Tracker" to use as a template.
- Small organizations may be able to keep their budget tabulated manually using folders and writing down their income and expenditures.
- Large organizations in need of a more sophisticated program should purchase accounting software such as Quickbooks, Money, or Quicken.

Your organization's Treasurer or Financial Officer (with the help of the Campus Advisor) should regularly balance your books with your Drury account. In the same way that balancing your personal checkbook helps you keep track of expenditures, plan for the future, and catch errors, this process will benefit your organization. See Section I for an overview of your Drury account and how to obtain statements.

The audit process

As stated in the SGA constitution, student fees allocated must be used towards the purpose for which they were allocated. Parties who have received student fee allocations must keep a record with receipts over how the fees were spent. Towards the end of each academic year, the budgeting committee will hold an annual audit and all groups who receive funding through student fee allocations will be required to submit their spending records over the allocated fees. This process is not meant to be a burden (and if the group was properly tracking their budget, it shouldn't be), but rather an appropriate check-and-balance system in order to prevent inappropriate use of student fees and to hold groups accountable for the money entrusted to them.

Should a group be found to be grossly misusing student fee money allocated to them, that group may lose their ability to request funding for one year.

More details about the audit process will be sent via email around late March/early April each year.

Section IV – Budgeting Guidelines

General Statement

When evaluating Budget Requests, SGA will consider the following guidelines. Senators will follow these guidelines and be consistent and efficient in allocating Drury student fees. Circumstances may arise that cause an allocation to fall outside of these stated guidelines.

Beneficiaries of Student Fees

Since only undergraduate Drury day school students pay the student activity fee, SGA will only directly allocate funds that benefit those students. CGCS students, faculty and staff are not entitled to student activity fees and will therefore not generally receive funding from student fees. In addition, student organizations should not expect an allocation substantially higher than the amount that its participants pay in student fees.

General Funding Criteria

- The Budgeting Committee will make their recommendations in a viewpoint-neutral manner.
- Funding for approved activities may be granted in any amount deemed reasonable by the committee. This may or may not be the entire amount requested.
- All Drury University rules, regulations, and policies are expected to be followed in any event for which SGA provides funding. If any university rules, regulations, or policies are not adhered to in any event for which SGA provides funding, the sponsoring organization who received funding must return the student fee money and will face university sanctions.
- The organization **MUST** be recognized by the Student Affairs Committee and in good standing with the Student Organizations Office.
- The organization **MUST** have submitted a satisfactory audit and completed all other stipulations required by SGA.
- The committee looks favorably on those groups which actively seek alternative sources of funding such as fundraising, membership dues, and outside sources, as well as organizations who are prudent in record-keeping.
- For a budget request, the organization must subtract out the remaining balance of its account based on its most recent audit.
- The organization's activities should positively affect the Drury Community and the student body.
- The committee considers the number of students who are actively involved in the organization, as well as the number of students who benefit from the event or activity.

Items NOT funded by SGA

- Activities that are required by an academic department or that directly support classroom instruction. These activities should be funded by the academic departments.
- Scholarships or monetary payments other than reimbursements for members.
- Meals for routine meetings which are generally attended by group members only or meal stipends for travel.
- Events where dining is the main purpose.
- Expenses not approved in advance by SGA will not be reimbursed. Groups should only spend money that has already been allocated to them and never in anticipation of future funding.
- Clothing or personal items for members unless directly related to recruitment or the purpose of the organization.
- Individual membership dues to local, national, or international organizations. These fees should be paid out of membership dues.
- Graduation apparel (cords, medallions, etc). These should be paid out of membership dues.

Charity/Donations/Community Service Allocations

- There must be a reasonable benefit to Drury full-time day school students.
- SGA may cover costs associated with operating a charitable/community service event. (i.e. gloves, advertisements, bags, etc.)
- SGA will NOT cover direct gifts/donations for charitable purposes. (i.e. cash donations, books to other institutions, etc.)

Travel & Conferences

Due to the large expense associated with travel and the generally concentrated benefit to a relatively small number of students, SGA will only allocate a portion of the travel expenses and request that student participants cover the remaining costs.

- Travel expenses usually fall into 1 of 3 categories: Registration, Transportation, and Lodging. We encourage organizations to seek out the most time and cost efficient means of travel. As a rule of thumb, SGA will fund the 2 most expensive categories for a group’s trip and require the participants to incur the cost for the 3rd (usually registration fees). As aforementioned, SGA will not allocate funds to cover the expense of food on trips.
- Travel expenses must be reasonable for the type of event and distance to/from the location.

• When requesting money for travel, student organizations must submit with their proposal a conference brochure or other conference information along with estimated transportation and lodging information with appropriate supporting details.
• SGA will not fund travel outside of the United States.
• In addition to the given parameters, SGA will not exceed an allocation of $250 per participant.
• SGA will limit conference/travel funding to 15 participants, and even less if due to budgetary constraints. Since allocations for travel will be heavily dependent on the number of participants, SGA expects that the number of participants allocated for actually attend. If fewer participants attend than allocated for, the remaining funds MUST be either refunded to SGA or retained in the student organization's account, and be noted in the audit. DO NOT request for more participants than you expect to attend.
• Student Groups will be allocated funds for only ONE trip per year by SGA.

Competitive-based travel teams

Certain student organizations travel extensively due to the nature of their organization. These organizations are competitive in nature and travel to other locations to pursue their primary function of competing. Because of the special circumstances surrounding these organizations, the committee has developed the following guidelines:

• Travel expenses usually fall into 1 of 3 categories: Registration, Transportation, and Lodging. We encourage organizations to seek out the most time and cost efficient means of travel. As a rule of thumb, SGA will fund the 2 most expensive categories for a group's trip and require the participants to incur the cost for the 3rd (usually registration fees). As aforementioned, SGA will not allocate funds to cover the expense of food on trips.
• Travel expenses must be reasonable for the type of event and distance to/from the location.
• SGA will not fund travel outside of the United States.
• In addition to the given parameters, SGA will not exceed an allocation of $100 per participant per trip.
• Competitive-based travel teams will be allocated funds for a maximum of THREE trips per year by SGA.
• Money for materials, supplies, and equipment necessary to the function of the group may be allocated; however items should become property of the organization, and by extension, the university, and not be kept by the individual members unless purchased from the group.
• Uniforms or other required dress should be paid for by the individual members unless they are to become property of the student organization.

Club Sports Teams

• Will be held to the same rules regarding travel as competitive-based travel teams.

• SGA will NOT fund shoes, pants/shorts, or other items considered ‘personal’ in nature.
• SGA may cover jerseys, balls and equipment, and protective gear if retained by the student organization for future use.

Subsidiaries

The Student Government Association has three organizations deemed “subsidiary” groups because of their long-lasting importance to the university and student body: The Mirror, KDRU/DUTV, and Student Union Board (SUB).

• SGA is obligated to grant financial support to the subsidiaries (no other student groups are guaranteed funding).
• Subsidiary groups are given preference in funding by being able to request funds a semester in advance (each April).
• No more than 65% of the total beginning student fee treasury for a fiscal year may be allocated to the subsidiaries together.

Newly recognized organizations

Organizations that have been established less than four years are considered “newly recognized.” These organizations are eligible for funding the same as any other group; however, SGA will monitor them closely to determine the group’s sustainability. Funding requests will be limited for **newly recognized groups to a maximum of $2000 for the first year**, subsequent requests may be increased if the group proves that it can be responsible, sustainable, and a positive effect on the Drury community.

Additional Guidelines

• A $100 stipend will be allotted to speakers, unless a set fee is set.
• T-shirt quantities of a reasonable amount can be requested at up to $5 per shirt. Additionally, shirts cannot be sold and used as a fundraiser.
• For car travel, a standardized per mile payment will be determined as 50% of the current IRS rate.

Availability of funds

Each year SGA has a limited amount of student fees to allocate based on the enrollment of the university and other special projects. It is the priority of the committee that each eligible group have a chance to request funds from SGA, therefore, many groups will not get their full request. The aforementioned guidelines set a maximum amount that will be allocated for certain requests, and groups may receive less than this amount due to budgetary constraints.

Your SGA Allocation Notification will explain in detail how much money your group was allocated and the reasoning behind the allocation.

Standardized Allocation Language

Full Slate	*The full request is recommended because all of the organization's expenses are reasonable and fall within the Budgeting Guidelines. Furthermore, this group always turns in thorough audits and its expenses are managed well.*
Pending submission of renewal documents	*The group is currently not in good standing with the Student Organization Office, therefore the allocation is pending submission of all required documents.*
Pending submission of a satisfactory audit	*The group has not turned in a satisfactory audit; therefore the allocation is pending submission of a complete audit to SGA.*
Tabled until recognition	*The group has not been formally recognized yet by the Student Affairs Committee and until such time cannot request funding. The allocation is therefore tabled until further notice.*
Tabled…more information…or other	*SGA does not have sufficient information to allocate money for the following request and asks that the group bring more detailed information and submit a new request.*
Low Priority Item	*Due to budgetary constraints, the requests for the following items were decreased due to their seemingly low level of priority.*
Budgetary Constraints	*SGA desires every eligible student organization the opportunity to request funding; therefore the following was cut from this request due to budgetary constraints.*
Newly recognized group	*Due to the fact that this group is relatively new on campus, SGA would like to see that the group can be successful and sustaining before they are allocated their full request.*
Previously allocated funds	*This group has already received some funding for this academic year. SGA desires every eligible student organization the opportunity to request funding; therefore the following was cut from this request due to budgetary constraints.*
Unreasonable request	*SGA feels that the amount requested is unreasonable for the activities outlined by the request.*
Minimal benefit for the student body	*SGA desires to allocate money that positively benefits the student body in the best way. It is our opinion that this request has only minimal benefit for the student body and has been cut due to budgetary constraints.*
Request falls outside of the Budgeting Guidelines	*There are certain requests that SGA does not generally fund (such as donations, required academic projects, meals for member meetings, or reimbursements). See the Budgeting Guidelines for a more detailed list.*

Appendix A: FAQ

<u>Questions about developing and submitting a budget:</u>

How detailed should our budget requests be?

Budget requests should be as detailed as possible. Use the sample budget in Appendix B as an example. The SGA reps will want to see that you have thought through your events and have them planned out.

We aren't sure how expensive some of our events will be. How do we go about estimating our expenses?

To estimate your expenses, it's best to start off by planning your group's activities for the year. This should ideally be done the year before at an officer transition meeting or new officer retreat. Your advisor or previous officers should be able to provide you with a previous budget request. Save your records! Each year, the officers should pass off their group manuals to the new officers.

Should we overestimate our expenses or be conservative?

Groups should estimate their expenses as accurately as possible.

Can our group submit our budget early and have it checked before we request? (Or) I have questions about my request. Can I schedule an advance meeting?

Groups are encouraged to contact the Finance Committee if they have advance questions about their budget. The VP of Finance (or SGA Advisor) can provide advice but it will only be their personal opinion. Final decisions will be made by the entire SGA assembly.

<u>Possible questions to expect in a slating meeting:</u>

How many people show up to your meetings and/or events?
What is your current account balance?
Are your meetings open for the entire school or members only?
What fund-raising have you done?
Is there any departmental funding?
Have you researched the product/travel for the cheapest price?
Where did you get the price you are quoting?
How many active members do you have?
How many attendees do you expect?
How does your organization positively affect the student body?

<u>Questions about spending money:</u>

How do I get reimbursed for money I've spent?

Please refer to Section III of this manual.

Where is the business office?

The Drury Business Office is located in Burnham Hall, room 100.

When is the business office open?

During normal business days from 8am – 5pm.

Do I always have to use a Tax-Exempt letter for my purchases?

YES! Drury is tax-exempt from sales tax. That means anything bought for Drury (including all its student organizations) are tax exempt. Tax exempt letters can be obtained from the Office of Student Organizations, FSC 120. If you forget to use the letter, you will NOT be reimbursed for the tax you spend.

How long does it take to get reimbursed for money I've spent?

If you submit a petty cash reimbursement slip under $75.00, the business office will reimburse you immediately. If the amount is over $75.00, then a check request will have to be submitted. Requests turned in by Thursday will be reimbursed the following Thursday. Refer to Section III of this manual.

Can I use a Drury credit card for my purchases?

Your Campus Advisor may have access to a Drury purchasing card or you may possibly check one out (with prior authorization) by calling Christie Garrison at ext 7200.

How long do I have to keep my receipts?
Original receipts are turned into the business office with your reimbursement requests or credit card slip. Your Campus Advisor should handle this. Your group's Treasurer or Advisor should keep all copies of expenses in your group's permanent records at least through the next academic year. At a minimum, you'll need these receipts for the SGA audit.

General questions:

What are my options if no money was allocated to my group?
If there were specific problems with your request, you can make changes and re-submit your request at the next Slating meeting. Otherwise, your group can charge membership dues, fundraise, or attempt to get corporate sponsorship.

Do I only get one chance per year to ask for money?
Typically, no. SGA tries to hold multiple Slating meeting throughout the year. Look for the schedule posted to the SGA website early in the academic year.

What does it mean if my request is tabled?
A request is "tabled" when it is set aside from the meeting's vote. This usually happens when the senators need more information about a request or the requesting group needs to fulfill some additional requirements before they receive money.

What does it mean if my request is pending?
A "pending" request means that there is some additional requirement attached to the money. This usually involves turning in the required paperwork or a completed SGA audit.

What if I am not happy with the amount that my group was allocated?
Groups who feel that they were treated unfairly may appeal their decision. Please refer to Appendix C in this manual.

Where can I get more information about the student organization registration and renewal process?
Contact the Office of Student Organizations, FSC 120.

Why do I have to be a registered/renewed group to receive SGA funding?
The registration/renewal process is in place to assure that groups who ask for money are legitimate, organized, and coincide with the Drury mission.

What is the Student Affairs Committee?
It is a standing faculty committee comprised of both students and faculty. One of their functions is to officially recognize new student organizations.

Questions about the Audit Process:

Who do I contact to get an audit form?
Towards the end of each academic year, SGA will send out the information regarding the audit process. Contact the SGA Advisor for more information.

How do I get the income/expense records for my group?
Each group should have a Treasurer or other person designated to track their budget. See Section III in this manual. These records should be checked against what Drury has recorded – check with your Campus Advisor or the Business Office to obtain a printout.

What if I don't have any receipts to validate my expenses?
Receipts are the best form of documentation; however, as long as your group can demonstrate the ability to track and organize their budget, the audit should go smoothly. SGA reserves the right to impose sanctions on groups that do not complete a satisfactory audit.

Are there any penalties for not completing a satisfactory audit?
Typically a group would lose their funding for 1 year and be on probation.

This sounds like a lot of work. Do we get any help through this process?
Each group is assigned an auditor from the SGA Finance Committee to help them through the process. In addition, you may contact the SGA Advisor.

Appendix B: SAMPLE BUDGET REQUEST

Mu Theta Fall 2008 Budget Request

AMTA National Conference 2008
St Louis, MO

Travel		
Van Rental[1]	**$85.00 x 4 days =**	**$340.00**
Insurance (estimate)	**$37.50 x 4 days =**	**$150.00**
Fuel (estimate)		**$100.00**
Parking	**$15.00 x 3 days=**	**$45.00**
Lodging		
Hotel[2]	**$656.62 x 3 nights =**	**$1969.85**
Registration	**$120 x 15 students =**	**$1800.00**
	TOTAL Budget:	**$4404.85**
Less remaining account balance from previous year		**($325.67)**
		$4079.18
Student Contributions[3]	**$120.00 x 15 students =**	**($1800.00)**
Total SGA Request	**(limited to $250 per person x 15 students) =**	**$2279.18**

1 15 passenger van rental from FISK. Driver will be Dr. Michael Cassity.
2 We will be staying at the Drury Plaza Hotel which is located 2 blocks from the conference hotel. This will save us about $800.00. We will need 4 rooms for 3 nights apiece at a rate of $164.15 per night.
3 Students will be responsible for the registration fee and their own food.

Benefits of the conference:

Drury students will attend to create more awareness for Drury’s Music Therapy program as well to allow students the opportunity to learn more about this unique field of study.

About Mu Theta:

Our organization has around 21 members with 10-15 attending each meeting held biweekly. Our membership continues to grow as more students come to Drury to study Music Therapy. Our organization is in good standing, having submitted a satisfactory audit last year and having completed the renewal process for this year with the Student Organization Office.

Appendix C: Appeal Process

The appeal process is reserved only for the following purpose:

- To determine whether the decision was made in a viewpoint-neutral manner.
- To determine whether the allocation process was conducted fairly and in accordance with the budgeting guidelines.

If a student organization wishes to appeal their allocation based on one of the above reasons, they must write a letter detailing their concern within two weeks of the allocation date. This letter can be e-mailed or delivered in person to the VP of Finance (see cover page) or to the SGA advisor, Matt Battaglia, mbattaglia@drury.edu. Once the letter requesting an appeal has been received, a meeting will be scheduled between the student organization requesting the appeal and the Appeals Committee.

The Appeals Committee will consist of:

- SGA VP of Finance
- SGA Advisor
- Two students that are not part of the SGA Finance Committee
- One staff/faculty member that is not a part of SGA

Based on the information presented in the meeting, the Appeals Committee will render its verdict. If the Appeals Committee finds the appeal to be valid, they will make a recommendation to the General Assembly of SGA to adjust the appealed allocation.

If the Appeals Committee finds the appeal to be invalid, or if the Appeals Committee finds the appeal valid but SGA General Assembly does not adjust the allocation, then the student organization can submit an appeal to the Dean of Students, who will review the appeal and make the final decision.

Appendix D: Budgeting Schedule
Academic Year 2009-2010

September 14 - Slating for first fall allocation @ 7 pm in FSC 204
-Groups requesting money must sign up for a timeslot by 5:00pm in the DOS
-Please bring 10 copies for the Finance Committee when you request

September 17 - Allocations @ 8 pm in Hoblit Suite

October 8 - Slating for second fall allocation @ 7 pm in FSC 204
-Groups requesting money must sign up for a timeslot by 5:00pm in the DOS
-Please bring 10 copies for the Budgeting Committee when you request

October 15 - Allocations @ 8 pm in Hoblit Suite

February 4- Slating for the final allocation @ 7 pm in FSC 204
-Groups requesting money must sign up for a timeslot by 5:00pm in the DOS
-Please bring 10 copies for the Budgeting Committee when you request

February 11 - Allocations @ 8 pm in Hoblit Suite

March 4- Slating for the final allocation @ 7 pm in FSC 204
-Groups requesting money must sign up for a timeslot by 5:00pm in the DOS
-Please bring 10 copies for the Budgeting Committee when you request

March 11 - Allocations @ 8 pm in Hoblit Suite

Early April – Information regarding audits are sent out via email

April 29 - Slating for the subsidiary allocation @ 7 pm in FSC 204
-Subsidiaries will be contacted directly
-Please bring 10 copies for the Budgeting Committee when you request

May 6 - Allocations @ 8 pm in Hoblit Suite

*This draft of the Financial Handbook, suggested by the 2008-2009 SGA Finance Committee, is used to aid the slating and allocation of student funds in a fair and efficient manner. This draft is subject to change in the future and is only a guideline for the committee. The Finance Committee reserves the right to modify this draft and any of its contents with approval from the SGA General Assembly. In addition, the committee also reserves the right to make decisions based on other information presented that may not directly comply with the aforementioned guidelines.