

SAFAC BUDGET WORKSHOP

2017-2018

WHAT IS SAFAC?

- Student Activity Fee Allocation Committee
- SAFAC allocates funding to **undergraduate student organizations** that are registered with COSO
- At least 75% of membership must be undergraduates
- SAFAC only allocates funds for one fiscal year. A referendum is required for multi-year expenditures.
- Fiscal year ends at the end of May → all unspent approved SAFAC funds will go back to SAFAC
- We are here to **subsidize** an organization's expenditures

WHAT DOES SAFAC CONSIDER WHEN FUNDING?

- Guiding Principles
- Necessity of the item, event, trip, etc.
- On campus and open to the entire student body?
- Active members in the organization (determined by Orgsync member number)

ENSURING FAIRNESS THROUGH GUIDELINES

- SAFAC no longer funds based on precedents.
- Guidelines are the funding policies SAFAC uses to determine how much we fund for certain items and what items we do not consider. (Ex. Tshirts - \$5, Flights - \$200)
- Guidelines can be added to throughout the year
- All Guidelines apply for the entire year (June 2017– June 2018)

TYPES OF FUNDING

- **Early Budget Request** (can ask for one)
 - Must be submitted during the spring semester of the previous year
 - Only for expenses taking place up until the first day of Finals, Fall semester
 - Money is removed from your account after the Fall Semester
 - Deadline **is Friday, March 3rd, 2017 by 5 p.m.**
 - **Cannot submit this budget within the Fall semester**
- **Regular Budget Request** (can ask for up to 2 per year)
 - Funding in excess of Early Budget Allocation
 - Must make an appointment to present before the committee
- *****Capital Items can be requested on either budget**
 - Requests for equipment or items that will **last more than three years**

BUDGET FORMS (PLEASE DON'T MAKE YOUR OWN!)

- All budget forms can be found online at www.miami.edu/SAFAC
- Download the forms from the website for every budget!!
 - **Do not use prior forms** – they are not updated with the correct formulas!!
 - This leads to problems with using the budget
 - Make sure the budget is on the correct form (FCS has their own form!)
 - Do not add/delete rows – this also causes problems with the budget
- Budget forms for 2017-2018 will be posted by Monday, February 13th, 2017

HURRICANE ADVERTISING

- Hurricane advertising is requested through an online Orgsync form and a 2017-2018 form will be up starting Monday, February 13th, 2017.
- **Deadline to request Hurricane Advertising for the 2016-2017 year is March 3rd, 2017.**
- Deadline to request Hurricane Advertising for the 2017-2018 year will be next year.
- The \$100.00 increments with a \$400.00 cap per academic year will remain the same

MAKING A SAFAC REQUEST

- Meet with your Executive Board to determine what your organization needs
- Fill out the 2017-2018 Budget Request Form
 - Documentation is required for everything except what is explicitly stated in the guidelines to not need documentation for (ex. flights, hotels)
- Meet with your liaison and get a signature
- Obtain signatures from advisor, president, and treasurer **AFTER** the liaison signs it
 - **It will be reprinted if you have signatures before the liaison signs it**

SUBMITTING YOUR BUDGET

- Submit the electronic excel copy on OrgSync via the form found here (“2017-2018 Early Budget Submission”): <https://orgsync.com/55364/forms/243246>
 - Deadline to submit the electronic copy is March 8th, 2017 by 5 PM
- Submit the signed form with stapled documentation to SC 206
- Sign up for a presentation time
 - No presentation is required for Early Budgets
 - Presentations for Regular Budgets are Wednesdays from 2:45 to 4:30

PRESENTING TO SAFAC AND UNDERSTANDING YOUR BUDGET AFTER IT IS REVIEWED



REGULAR BUDGET SUBMISSIONS

- Make sure you have submitted the electronic copy of your budget to the SAFAC portal on Orgsync under “Forms”. This must be submitted at the latest by the Monday before your Wednesday appointment. **If it is not on Orgsync by that Monday, your organization will not be permitted to present.**
- The SAFAC Chair will email you a couple days before your presentation to double check that everything has been submitted and to remind you of your appointment.

AFTER VOTING: DETAIL SHEET – 2016-2017

	A	B	C	D	E	F	G
1	Organization: Zephyrhills Club						
2							
3	Organization Guiding Principles (Please copy from your organization's constitution & paste below):						
4	The purpose of the Zephyrhills Club is to facilitate the appreciation and personal enjoyment of water by each and every University of Miami student. We will do so by attending conferences, consuming various types of water, and experiencing first-hand the bodies of water in our local community in order to broaden students' horizons.						
5	-Please make sure to list requested expenses in PRIORITY ORDER! -Please remember that the requested expense MUST match the quotes provided (NO ROUNDING!)						
6	DESCRIPTION	PROJECTED INCOME	APPLIED INCOME	REQUESTED EXPENSE	APPROVED EXPENSES	STIPULATED EXPENSES	CAPITAL?
7	Personalized Water Bottles (\$3.49 each)			\$349.00	\$0.00		
8							
9	Water Appreciation Conference, UNF						
10	Registration Fee (\$200/person; 7 people)*			\$1,400.00	\$1,050.00		
11	Hotel (\$120/room; 2 boys 5 girls)*			\$360.00	\$300.00		
12	Mileage (347.6 miles one way, 2 cars)*			\$750.82	\$750.82		
13							
14	<i>*italicized=just for example purposes, do not need this on budget</i>						
15							
16							

AFTER VOTING: COVER SHEET 2016-2017

Total Projected Income:	\$0.00	Total Applied Income:	\$0.00
Requested Expenses:	\$2,859.82	Approved Request:	\$2,100.82
		Stipulated Funds:	\$0.00
= Total Requested Expenses:	\$2,859.82	= Total Approved Expenses:	\$2,100.82
<p>To the best of my knowledge the organization requesting the attached budget is registered with the Committee on Student Organizations.</p>			
<p>All information included is accurate and follows the guidelines provided by SAFAC.</p>			
<p>You MUST receive your SAFAC Liaison's Signature FIRST.</p>			
SAFAC Liaison Signature			Date
President's Signature			Date
Treasurer's Signature			Date
Advisor's Signature			Date
<p>Committee Comments: Personalized Water Bottles not funded, seen as personal item. UNF Conference funded at 2016-2017 Guidelines.</p>			

HOW DO I GET THE MONEY I WAS APPROVED FOR?

- Business Expense Reimbursement Form (BERF) – common, but NOT recommended
- Interdepartmental Requisition (IDR) – department to department within UM
- E-Checks – For vendors approved by UM
- Purchase Orders – Usually for speakers with contracts or entertainment
- P-card – Talk to your advisor to see if he/she has a p-card

GENERAL ACCOUNT INQUIRIES

- Talk to your advisor for account balance inquiries, as SAFAC does not have access to your accounts
- Consult the Student Organization Handbook for more information on using funds
- SAFAC does NOT fund reimbursements (not to be confused with BERFs)
- Consult the Guidelines for policy
 - Budgets must be SUBMITTED at least two weeks before the first expense needs to be made.
- PLEASE PLAN AHEAD!
- If an emergency arises – contact safac@miami.edu immediately

STIPULATED FUNDS

- Extra step to ensure that the money is being used for the correct reason
- Must be claimed via Orgsync - <https://orgsync.com/53219/forms/200743> - "2016-2017 Request to Release Stipulated Funds"
- Entertainment, travel, **items above \$2,500.00 will be stipulated.**
- Once stipulated funds are claimed, they will go into your SAFAC account and can be claimed by a BERF if the money was paid out of pocket.
- BERF's are found online at miami.edu/BERF and must be printed out and turned in to SASO (SC 206).

APPEALS

- First contact safac@miami.edu to set up an appointment to discuss your concerns
- If an agreement cannot be made, the organization must fill out the appeals form at miami.edu/safac under “Funding Request Forms”
- Policy and Finance Committee will decide if the appeal will go through to Senate
- Senate opinions go to the Vice President of Student Affairs

2017-2018 SAFAC PROCESS AND BUDGET CHANGES



PRE-AUTHORIZATIONS

- Pre-Authorizations will no longer be accepted by SAFAC.
- All budgets must be turned in at least two weeks prior to the first purchase or it will be seen as a reimbursement and will not be funded.
- Therefore, PLAN AHEAD!!
- You can email SAFAC@miami.edu with any questions/concerns throughout the year.

2017-2018 BUDGET FORM

- Income is no longer required to be on the form
 - If you would like, you can tell the liaison during your meeting about your organization's income
 - Incomes for large events that are being hosted will be written down by the liaison and may be applied to the budget.
- Let's take a look

2017-2018 GUIDELINE MAJOR CHANGES

- **Costumes** – Funded for “n” number of people up to \$2,000. (No longer a max of \$50 per person)
- **Entertainment** – a maximum of \$3,500 will be funded for entertainment (Includes, speakers, dunk tanks, inflatables, etc.)
- **Off-Campus facilities** for FCS Organizations funded up to a max of \$8,000 per academic year (no more than \$4,000 on the early budget) – includes gym membership and passes for orgs that cannot operate on campus.
- **Shipping** – Cheapest method of shipping costs will be funded.

MAJOR GUIDELINE CHANGES - CONT.

- **Uniforms** – Funded according to Active Member Guideline (n+2, n+4)
- **Hurricane Advertising** – Still funded using the Orgsync form.
- As a reminder, Guidelines can be added to throughout the year.
- **UPrint** – Orgsync form <https://orgsync.com/55364/forms/243286> – “2017-2018 UPrint Submission Form”

COMMON QUESTIONS

- I was funded an event (venue, conference, competition, etc.), but I would like to go to a different one. Can I spend my SAFAC funds on the new event instead?
 - NO! You must spend your money as allocated line by line.
 - You must request permission from SAFAC to spend your allocation on different items. Contact your liaison for help.
- The price of an item has changed. Can SAFAC fund the difference?
 - In certain cases, some items can be re-looked for a cost difference.
 - You would need to fill out the Cost Adjustment Form. It is on OrgSync, under SAFAC's page under "Forms."
 - Contact your liaison for help.
- How do I find out how much money is in my accounts?
 - Your SAFAC liaison will NOT have access to your account. Only your advisor has access to your account.
 - If your advisor is unsure how to check your account please email Kelly Hui at k.hui@miami.edu

COMMON QUESTIONS (CONT.)

- Can I spend SAFAC money on items I didn't request?
 - NO! You must spend your money as allocated line by line.
 - You must request permission from SAFAC to spend your allocation on different items.
 - Organizations could be potentially audited if there are any improprieties in the organization spending

QUESTIONS?



THANK YOU FOR COMING! MAKE SURE YOU SIGN
IN

