



# KUSSI'S

## STUDENT GUIDE

### 2009-2010



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# Kutztown University Student Services, Inc.

## Who is KUSSI?

KUSSI is a non-profit corporation operated exclusively for charitable and educational purposes. KUSSI works closely with the Student Government Board (SGB) to provide free and low cost services for students and student-led organizations at Kutztown University. All services are made possible through the careful management of the student activity fees and proceeds from auxiliary operations. KUSSI receives no subsidies of any kind and contributes the majority of its proceeds to student organizations, cultural and capital improvement projects, scholarships and campus athletics.

## What accounting services does KUSSI provide?

- » Banking Services – Open Accounts & Accept Deposits
- » Purchasing – Purchase Requests & Purchase Orders
- » Check Requests – Check Requests & Vendor Payments
- » SGA Budget Process – Initial SGA- Budget Request
- » Additional Funding – Budget Allocation Changes, Scheduling Budget/Finance Committee Meetings
- » Special Funding – Remaining Budget Funds for Special Purchases
- » Event Services – Vendor Contract Approval, Cash boxes

# What is your organization's status?

## SGA GOLD STATUS

The highest level of status available to a student organization, SGA Gold Status, enables an organization to request funding from the Student Activity Fee by participating in the SGA Budget Process. Once an organization has been approved by the Student Government Board (SGB) for SGA Gold Status, the organization receives Gold Status privileges which include all privileges available to student organizations (1 - 10).

## SGA MAROON STATUS

The second highest level of status available to student organizations, SGA Maroon Status, enables organizations to develop their mission statements and bylaws, take another step towards SGA Gold Status, and to receive increased privileges. Maroon Status privileges also include all privileges available to registered organizations (1 - 8).

## REGISTERED

All Student Organizations on campus are required to register with the Office for Student Union & Involvement Services. Registered student organizations are entitled to many privileges (1 - 6).

## STUDENT ORGANIZATION STATUS PRIVILEGES

10. Use of SGA funds as allocated by SGB during the SGA budget process.
9. Use of "SGA Gold Status" designation in communications.
8. Use of "SGA Maroon Status" designation in communications.
7. Use of SGA-owned equipment and resources including SGA vans, MSU copy machine, fax machine and SGB office telephone.
6. Use of the University's name in promotional materials and posting those materials in accordance with University Policy.
5. Access to University facilities for meetings and programs.
4. Use of Bulletin Boards, Activities Calendar, and KU Daily Brief for advertising in accordance with University Policy.
3. Use of the campus mail services.
2. Participation in Campus Sales and Solicitation Process.
1. Use of KUSSI accounting services.

# STUDENT ORGANIZATION STATUS & PRIVILEGES

## REGISTERED STATUS

- Student Organizations register with the Office for Student Union & Involvement Services (MSU Room 153) by completing a Student Organization Registration Form.
- It is important to keep the Student Organization Registration Form up to date with current executive officers. If the signature on a check/purchase request does not match the signature form, the check/purchase request cannot be processed.

## PRIVILEGES FOR REGISTERED ORGANIZATIONS

- Use of the University's name in promotional materials and posting those materials in accordance with University Policy.
- Access to University facilities for meetings and programs.
- Use of Bulletin Boards, Activities Calendar, and KU Daily Brief for advertising in accordance with University Policy.
- Use of campus mail services.
- Participation in Campus Sales and Solicitation Process.
- Use of KUSI accounting services.

## APPLYING FOR SGA MAROON STATUS - FIVE EASY STEPS:

1. **Once registered for fifteen (15) academic weeks, a student organization may apply for SGA Maroon Status by completing an SGA Maroon Status Application Form in the Office for Student Union & Involvement Services.** The Office for Student Union & Involvement Services then forwards this completed application and a copy of the student organizations mission statement and bylaws to the SGB Parliamentarian to be reviewed by the SGB Constitutions/Policy Committee.
2. **The student organization president and advisor will receive a status letter within three (3) weeks of submitting their application to the SGB Constitutions/Policy Committee.** This status letter will outline any necessary revisions to the mission statement and bylaws.
3. **The student organization president has thirty (30) days to complete revisions and resubmit the mission statement and bylaws to the SGB Constitutions Committee.**
4. **Once all revisions are completed, the SGB Constitutions/Policy Committee will recommend to the Student Government Board that SGA Maroon Status be approved** Once approved by the Student Government Board, the mission statement and bylaws will be forwarded to the Student Affairs Committee and the University President for final approval.

# STUDENT ORGANIZATION STATUS & PRIVILEGES

## APPLYING FOR SGA MAROON STATUS (CONTINUED)

5. The student organization will receive a final approval letter granting SGA Maroon Status, once all approvals have been secured.

## PRIVILEGES FOR SGA MAROON STATUS ORGANIZATIONS

- Use of "SGA Maroon Status" title in communications.
- Use of SGA-owned equipment and resources including SGA vans, MSU copier, fax machine and SGB office telephone.
- Use of the University's name in promotional materials and posting those materials in accordance with University Policy.
- Access to University facilities for meetings and programs.
- Use of Bulletin Boards, Activities Calendar, and KU Daily Brief for advertising in accordance with University Policy.
- Use of campus mail services.
- Participation in Campus Sales and Solicitation Process.
- Use of KUSI accounting services.

# STUDENT ORGANIZATION STATUS & PRIVILEGES

## APPLYING FOR SGA GOLD STATUS - FIVE EASY STEPS:

1. **Once SGA Maroon Status has been maintained for fifteen (15) academic weeks, a student organization is eligible to apply for SGA Gold Status by completing an SGA Gold Status Application Form in the Office for Student Union and Involvement Services (MSU Room 153).** The Office for Student Union and Involvement Services then forwards the completed application and a copy of the student organizations mission statement and bylaws to the SGB Parliamentarian to be reviewed by the SGB Constitutions/Policy Committee.
2. **The student organization president and advisor will receive a status letter within three (3) weeks of submitting their application to the SGB Constitutions/Policy Committee.** This status letter will outline any necessary revisions to the mission statement and bylaws.
3. **The student organization president has thirty (30) days to complete revisions and resubmit the mission statement and bylaws to the SGB Constitutions Committee.**
4. **Once all revisions are completed, the SGB Constitutions/Policy Committee will recommend to the Student Government Board that SGA Gold Status be approved.**
5. **Once approved by the Student Government Board, the student organization will receive a final approval letter granting SGA Gold Status and the student organization treasurer may request funding by contacting the KUSI Service Center to schedule a meeting with the SGB Budget & Finance Committee.**

## PRIVILEGES FOR SGA GOLD STATUS ORGANIZATIONS

- Use of "SGA Gold Status" title in communications.
- Use of SGA funds as allocated by SGB during the SGA budget process.
- Use of SGA-owned equipment and resources including SGA vans, MSU copier, fax machine and SGB office telephone.
- Use the University's name in promotional materials and posting those materials in accordance with University Policy.
- Access to University facilities for meetings and programs.
- Use of Bulletin Boards, Activities Calendar, and KU Daily Brief for advertising in accordance with University Policy.
- Use of campus mail services.
- Participation in Campus Sales and Solicitation Process.
- Use of KUSI accounting services.

# BANKING SERVICES

## ACCESSING YOUR SGA BUDGET FUNDS

- The annual budget is derived from the student activity fee that every full-time KU student is obligated to pay as part of tuition.
- When your organization plans to utilize Budget funds to pay for expenses related to an event, it is important to advertise the event, trip, dinner, etc.
- Advertisements must be resources that every KU student has access to. Examples: Bear Essentials, The Daily Brief, post flyers all around campus. Facebook, MySpace, etc. cannot be considered a resource because not every KU student has a profile,
- When submitting a Purchase or Check request, the advertisement MUST be handed in as well to verify that the event was advertised, and open to all KU Students. If the advertisement is not attached KUSSI will not be able to process your Purchase/Check request.
- If the event is restricted to members of your organization only, Private account funds must be used.

## SGA VEHICLE ACCESS:

- KUSSI has three SGA vehicles that may be used by Maroon & Gold Status organizations.
- THE VEHICLES CAN ONLY TRAVEL WITHIN A 50 MILE RADIUS outside of the Student Union Building
- Two out of the three vehicles may be used at once. If the third vehicle is needed, the organization must submit a letter to SGB explaining the need for the third vehicle. After submission of the letter, and executive member of the organization would be required to attend a Tuesday evening SGB meeting.

PROCEDURE TO RESERVE AN SGA VEHICLE: Please note: This is only a summary of the SGA vehicle policy. For additional information please request a copy of the KUSSI SGA Vehicle Policy and Procedures addendum.

- Submit your license at the KUSSI office. Upon arrival you will be asked to complete a Motor Vehicle Report Release Form.
- The MVR report typically takes two days to obtain results. If your driving record shows any of the violations listed on the SGA Vehicle Policy "Exhibit A", you will be contacted and asked to find another driver.
- Utilize MapQuest, or a similar website that estimates the total miles. Multiply the total miles by the IRS Current Standard Mileage Rate. Effective January 1, 2009 the current mileage rate is \$.55
- Submit a purchase request in the amount of the estimated mileage rate.
- Submit a vehicle reservation form as soon as possible. SGA vans are reserved on a first come, first serve basis.

# BANKING SERVICES

KUSSI provides banking services to all “Registered”, “SGA Maroon Status” and “SGA Gold Status” student organizations. All student organizations that collect or receive money are required to deposit and maintain these funds in the KUSSI Service Center. Student organizations are not permitted to open or maintain any off campus bank accounts. For more information, please refer to University Policy 1995-631 On-Campus Sales, Fund Raising and Solicitation and University Policy 1997-122 Collection of Funds.

## OPENING PRIVATE ACCOUNTS

- A private account may be opened by any “Registered”, “SGA Maroon Status” or “SGA Gold Status” student organizations.
- To open an account, the organization's treasurer will need to bring all funds to be deposited into the KUSSI Service Center. At that time, a KUSSI Service Center staff member will open an account for the organization, establish a 3-digit account number and explain the procedures for depositing and withdrawing funds.
- Private accounts are used to deposit money from fundraising, donations, or any other source of funding unrelated to the Student Activity Fee. Private account balances carry over from year to year.
- Student organizations may spend funds from their private account on any purchase except alcohol, tobacco products or any illegal substances.

## PRIVATE ACCOUNT STATEMENTS

- Private account statements will be distributed monthly to student organizations by the KUSSI Service Center via normally mailing methods.
- Account statements are also available upon request by a student organization's treasurer during KUSSI Service Center business office hours.

# BANKING SERVICES

## DEPOSITING FUNDS - FOUR EASY STEPS:

1. **Complete Deposit Slip.** Deposit Slips are located in the KUSI Service Center and include the following information: date, organization name, name of depositor, source of deposit (i.e. fundraising, dues, other), account number, type of account (Private or SGA -Budget), cash total and/or check total.

Guidelines to follow when depositing checks:

- All checks should be made payable to KUSI.
  - All checks should include your club's 3 digit account number on the upper left hand corner of the check.
  - All checks should be deposited within 1 week of receiving them. If checks are held, there is an increased risk that once deposited; they may not clear the bank.
  - In the event a check is returned from the bank we will notify the person who wrote the check requesting a replacement. We will also notify the club treasurer. If the person fails to replace the check within the time allowed the club treasurer will be notified again and the club may choose to take action against the student through the Office of Student Conduct Standards.
2. **Verification of Deposit Amount.** Please total the cash amounts and/or check amounts prior to submitting the deposit to a KUSI Service Center staff member. The KUSI Service Center staff member will count the cash and/or checks to verify the deposit amount. If the amount differs from the amount indicated, the staff member and the depositor will recount the money together to determine the accurate amount.
  3. **Deposit Receipt.** Once the deposit amount has been verified, a receipt of the transaction will be given to the person making the deposit. If this person is not the organization's treasurer, he/she should forward this receipt to the organization's treasurer.
  4. **Account.** Deposits will be entered against the student organizations' account within 24 hours.

# PURCHASING SERVICES

## MAKING A PURCHASE - THREE EASY STEPS:

1. **Complete a Purchase Request Form.** Purchase Request Forms are available in the KUSI Service Center and include the following information:
  - Date
  - Organization's Name
  - Organization's Treasurer's signature
  - Organization's Advisor's signature
  - Account Number (and line item number)
  - Vendor/Individual's Name & Address
  - Quantity, description, unit price, and total amount of purchase
  - Attach "back-up" paperwork which explains/details the purchase being made
2. **Creating a Purchase Order.** Once a completed purchase request form is submitted, a purchase order will be generated by a KUSI Service Center staff member and be available for pick-up by the Student Organization within twenty four (24) hours. This purchase order will allow the organization to purchase the items specified on the purchase order without having to pay for them immediately. Purchase orders are only valid for 60 days from issued date. All purchase orders not used within 60 days will be voided and cancelled.
3. **Guidelines to follow when using SGA Purchase Orders at the KU Student Bookstore.** When purchasing a gift certificate from the KU Student Bookstore, a purchase order may not be used for the transaction. In this situation, an actual check must be presented to the cashier as payment for the gift certificate. Refer to "Check Requests" for further explanation of this procedure.
4. **Please keep in Mind** that a purchase order is a guaranteed payment to a vendor. A purchase order sets a requested amount of money from your KUSI account aside. Once you return the receipt from the vendor, the un-used money will return to your account.

**For Example:** Your organization completes a purchase order in the amount of \$100, but only uses \$95, the remaining \$5 will be returned to your account.

**If making a purchase from an outside vendor**, please be sure to ask them if they accept purchase orders.

**Local Vendors that Accept Purchase Orders:** Please contact us for a complete list!

- Weis
- Wal-Mart, Temple
- Mamma's
- Camillo's

# CHECK REQUESTS

## DIRECT CHECK REQUEST WITHOUT A PURCHASE ORDER:

1. **Complete a Check Request Form.** Check Request Forms are available in the KUSSI Service Center and include the following information:
  - Date
  - Organization's Name
  - Organization's Treasurer's signature
  - Organization's Advisor's signature
  - Account Number (and line item number)
  - Vendor/Individual's Name & Address
  - Check Delivery Method
  - Quantity, description, unit price, and total amount of purchase
  - Attach "back-up" paperwork which explains/details the purchase
  - NOTE: If reimbursement is for food expenses, a detailed receipt must be obtained from the restaurant representing a full listing of food/beverage items purchased. Credit card summary receipt can not be accepted as proof of payment. Please be sure to request a detailed receipt BEFORE leaving the restaurant.
2. **Delivery Method.** Indicate to the KUSSI Service Center staff member, and/or on the check request form, the delivery method for the check requested. (E.g. mail to vendor/individual or hold in the office for pick-up). In the event the check is made payable to a student, staff or faculty member, only the person to whom the check is made payable to may pick up the check with a valid student identification card or driver's license.
3. **Please Keep in Mind** that a check is used for reimbursements, and only if a vendor does not accept Purchase Orders.
4. **Check Availability.** Checks are created by the KUSSI Service Center on Tuesdays and Thursdays of each week, excluding holidays.
  - **Complete/Accurate paperwork submitted by Monday at 12:00pm – Pick up check Wednesday after 8:00am**
  - **Complete/Accurate paperwork submitted by Wednesday at 12:00pm – Pick up Check Friday after 8:00am**

Paperwork submitted outside these guidelines will be processed on the next check processing day. The KUSSI Service Center can not offer "same day" check creating services. It is important that pre-planning is considered to avoid any delays in payment to vendors/individuals. Checks will be available for pick up on Wednesdays and Fridays. Checks requested to be held for pick up will only be held for two weeks. After two weeks, the checks will be mailed.

# CHECK REQUESTS

## CHECKS CREATED FROM A PURCHASE ORDER:

Before any invoice or bill will be paid by the KUSSE Service Center, we must receive approval from the organization that the goods or services were received and the bill is OK to pay. This approval is confirmed by way of a signature by an organization officer or advisor, preferably with the phrase "OK to pay" on the invoice or bill.

1. **If the original bill was given to an organization member at the time of purchase**, it is the responsibility of that member to turn the bill in to the treasurer or advisor for approval. The approval may be written directly on the original bill and then must be turned into the KUSSE Service Center. The invoice will be processed for payment.

Only original invoices will be used for payment. The KUSSE Service Center cannot pay invoices/bills that are not originals. If the organization wishes to keep an invoice for record keeping purposes, it must keep a copy and submit the original to the KUSSE Service Center.

2. **If the original bill is sent directly to the KUSSE Service Center from the vendor**, an e-mail will be sent to the organizations' treasurer requesting them to stop by the KUSSE Service Center to "sign-off" on the invoice in order to authorize payment. If there is no response within 14 days, then a follow-up e-mail will be sent to the organizations' treasurer, with a copy sent to the advisor, advising of the importance of signing off on the invoice to authorize payment. Once the invoice is signed then it will be processed for payment.

By signing the purchase request, the Treasurer or other officer of the organization, authorizes payment to the vendor. Receipt of the goods or services must however be acknowledged before invoices can be paid. The advisor is able to acknowledge receipt of the goods or services on behalf of the organization. This allows invoices/bills to be paid after students have left the campus during breaks or over the summer or at any other time when an organization officer would not be available to approve the invoice/bill.

3. **If payment of the invoice/bill exceeds the purchase order amount**, follow the same guidelines as above, however, in addition the following will be assumed:

Providing additional funds are available in the organizations account, once the original invoice/bill receives written approval for payment, the invoice/bill will be paid in full. Any additional amounts, above the original purchase order amount will be charged against the organizations' account. It is the responsibility of the organizations' Treasurer to reflect the additional cost on the organizations' books.

# CHECK REQUESTS

## CHECKS CREATED FROM A PURCHASE ORDER (Continued)

4. **Check Availability.** Checks are created by the KUSSE Service Center on Tuesdays and Thursdays of each week, excluding holidays. Complete and accurate paperwork submitted by noon on Monday will be processed on Tuesday. Complete and accurate paperwork submitted by noon on Wednesday will be processed on Thursday. Paperwork submitted outside these guidelines will be processed on the next check processing day. The KUSSE Service Center can not offer "same day" check creating services. It is important that pre-planning is considered to avoid any delays in payment to vendors/individuals. Checks will be available for pick up on Wednesdays and Fridays. Checks requested to be held for pick up will only be held for two weeks. After two weeks, the checks will be mailed.

## END OF ACADEMIC YEAR CONSIDERATIONS

At the end of the semester, it is imperative that the organization treasurer be sure all requests for payments/reimbursements are completed prior to leaving campus. Once the student body adjourns for the summer, it is difficult for student organizations to complete regular business activity. Without an officer's signature on invoices or check requests, we are unable to make payment, even if the advisor approves the invoice. If you anticipate any year end activities, please get the paper work completed BEFORE you leave campus.

A "Summer Release of Authorization" form may be completed to allow the student organizations' advisor to act on their behalf during semester breaks when officers are not available for written approval on purchase/check requests. This form can be obtained in the KUSSE Service Center and must be fully completed and submitted prior to any action being made. In addition, a new "Student Organization Registration" form would need to be completed and submitted to the Office for Student Union and Involvement Services (MSU 153), taking effect after spring graduation. Without a "Student Organization Registration" form on-file, account access will be denied.

Any purchase orders not used by June 15<sup>th</sup> will be automatically cancelled due to fiscal year end. If an invoice is presented, after the purchase order to cover its expenses has been cancelled, the invoice will be paid out of the new fiscal year budget beginning July 1<sup>st</sup>.

# SGA BUDGET PROCESS

## SGA-BUDGET PROCESS FOR SGA GOLD STATUS STUDENT ORGANIZATIONS - FOUR EASY STEPS:

1. **In late September, SGA Gold Status Student Organizations, that are registered with the Office for Student Union & Involvement Services, will receive their SGA Budget Packets for the next academic year's budget requests.** If your organization does not receive an SGA-Budget Packet in the mail, packets are available in the KUSI Service Center, MSU 171.
2. **In October, SGA Gold Status Student Organizations submit their completed Budget Packets to the KUSI Service Center by the announced deadline.** Standing Committees are required to attend a budget hearing with the SGB Budget Committee.
3. **In November, the preliminary Student Organization Budgets are posted in the KUSI Service Center for all student organizations to review.** Student organizations may schedule a meeting with the SGB Budget Committee to discuss any concerns regarding the preliminary budget allocations.
4. **In July, Student Organization Budgets are available for use for the new academic year.** The final budget allocations are posted outside the KUSI Service Center, MSU 171.

## SIGNING UP FOR SGB BUDGET HEARINGS

- Any "Gold Status" student organization that turns in an SGA Budget Packet may sign up for a budget hearing in order to more clearly explain their budget packet to the SGB Budget Committee.
- Budget hearings are required for those organizations listed as "Standing Committees".
- Reminders will be given at the time of sign up listing the date, time and location of the budget hearing.

# SGA BUDGET PROCESS

## BUDGET INFORMATION & HELP

- Budgets are available to all “SGA Gold Status” student organizations and are provided to the organizations by the Student Government Association from the Student Activity Fee.
- Spending from budget funding must be used for the benefit of all students, the campus community as a whole and for the operation of the “SGA Gold Status” student organization.
- All “SGA Gold Status” student organizations receiving an SGA budget must keep their own financial records. These records are subject to review upon request of the SGB Treasurer, President, or Advisor.
- Budget funding **may not** be used to:
  - Fund groups whose membership is not open to all students who have paid the undergraduate student activity fee
  - Fund religious or political activities, charitable contributions, gift purchases, or events which are not sponsored by the University (Board of Governor Policy 1983-03A)
  - Pay for any goods or services that would violate Section 501(c)(3) of the Internal Revenue Code
  - Purchase items of equipment costing \$500 or more with a life of two (2) or more years without special permission from SGB
  - Pay for admissions to amusement parks (unless attending the park is consistent with the organization’s mission and statement of purpose)
  - Pay for meals or food for members (including meals at a conference or workshop, on fieldtrips, food or refreshments at regular meetings where no special event is planned)
  - Pay the salary of any coach
  - Front the cost of fundraising activities
  - Make loans to any other organization or club member
  - Reimburse individuals, students, faculty or staff for stolen, lost, or damaged personal property
  - Purchase clothing or items to be kept by club members
  - Purchase alcohol, tobacco products or any illegal substances
- Student organizations are mailed a monthly account statement. If a student organization would like more detailed account information regarding their budget account, the organizations’ treasurer may request additional financial reports through the KUSI Service Center.

# SPECIAL FUNDING

Special Funding is a specific type of request for funding made to the Student Government Board during the spring semester. Special Funding utilizes excess reserves to allow for purchases that would not normally be supported in an organization's operating budget. Special Funding is dependent upon having excess reserves and is not guaranteed in any year.

## TYPES OF SPECIAL FUNDING REQUESTS:

- Requests made to cover the purchase of equipment where the individual items cost \$500 or more, and/or equipment that can be used by the organization for at least two (2) years; or
- Requests made for special or unusual activities that would not be supported by the organization's operating budget.

## SUBMITTING A REQUEST - TWO EASY STEPS:

1. **Special Funding Request Forms will be sent to all "SGA Gold Status" organizations via campus mail distribution, in the spring semester, to request funding for the next academic year.**
2. **Completed request forms are to be returned to the KUSI Service Center by the deadline indicated.** In order for the request to be considered, all necessary information must be included. Be sure to include the equipment or expense in as much detail as possible. It is advisable to attach copies of Brand names, model #'s, written quotes, product pamphlets, etc.

## SPECIAL FUNDING PROCESS - SIX EASY STEPS:

1. **The SGB Finance Committee reviews all submitted Special Funding Requests.**  
If sufficient information is not provided on the request form, the SGB Finance Committee may contact the organization for more information, to assist in determining the importance of the request.
2. **The SGB Finance Committee prepares and submits a prioritized Special Funding List to the Student Government Board for approval.**
3. **Once approved by SGB the Special Funding Prioritized List is forward to the KUSI Board of Directors for their approval.**

# SPECIAL FUNDING

## SPECIAL FUNDING PROCESS (Continued)

4. **In August (after completion of the annual audit), the amount of remaining funds available for Special Funding is determined.** If the amount of available funds is less than the total amount needed, then funding is provided based on the priority list. Any requests that cannot be funded may be resubmitted to the next academic year's Special Funding Process.
5. **The prioritized list and available funding amount are sent to the University President for approval.**
6. **Once approved, all participating student organizations will be notified of the status of their Special Funding Request.** Student organizations receiving funding should proceed following the normal purchasing process.

## FREQUENTLY ASKED QUESTIONS

### **How may our organization spend Special Funding that has been awarded to us?**

Special Funding is awarded for the specific equipment or activity as submitted on the original request and approved by the Student Government Board. If an organization needs to modify their original request after final approval, a request for substitution must be made as follows:

1. Prepare a written request to the Student Government Board that includes a detailed explanation of the changes in your original request. This explanation should state why your organization no longer needs to make the approved purchase, a description of what new item is being requested and why purchasing this item is more important than your original requested item. It is important to attach as much information as possible describing the new item.
2. **This request must be signed by both the treasurer and advisor and should include both phone numbers and email addresses.**
3. Bring the request and a copy to the KUSSE Service Center to be scheduled to attend an SGB Budget & Finance Committee meeting.
4. At the SGB Budget & Finance Committee meeting, be prepared to answer questions regarding the newly requested item.
5. The SGB Budget & Finance Committee will request that you attend an SGB meeting to answer questions from the entire Student Government Board and to receive approval.

# SPECIAL FUNDING

## FREQUENTLY ASKED QUESTIONS (Continued)

6. If the substitution is approved by the SGB, proceed with the purchase of the new item following the normal purchasing process.

### **What if a capital equipment item must be replaced and our organization cannot wait for next year's Special Funding?**

1. Prepare a memo to the SGB Treasurer.
2. Identify the equipment to be replaced (e.g. Manufacturer, model #, serial number, brief description).
3. Explain why it needs to be replaced as soon as possible.
4. Provide information about the new equipment you want to buy (e.g. Price, description of equipment, product specs, etc.).
5. The more information an organization can provide the better. Identify how you would like to pay for the item:
  - a. Request the cost from an additional allocation;
  - b. Request to use money from your SGA account; or
  - c. Request a combination of the above.
6. **The memo must be signed by both the treasurer and advisor.**
7. Bring the memo and a copy to the KUSI Service Center to be scheduled to attend an SGB Budget & Finance Committee meeting.
8. At the SGB Budget & Finance Committee meeting be prepared to answer questions regarding the request.
9. The SGB Budget & Finance Committee will request that you attend the SGB meeting to answer questions from the entire Student Government Board.
10. If funding is approved, proceed with the normal purchase procedure outlined in the KUSI policies and procedures.
11. If any part of the funding is provided from an additional allocation, it should be indicated at the top of the purchase requisition with the words "Additional allocation" in addition to any expense line that is being used in the area of the account/expense line section of the purchase request.

# ADDITIONAL FUNDING

## SEEKING ADDITIONAL FUNDS OR FUND CHANGES

- **Need more money?** - “SGA Gold Status” student organizations may find that the SGA Budget awarded to them is not sufficient for all the activities they would like to do during the academic year. The student organization may request consideration for additional funding by:
  - Obtain and complete an SGA Additional Allocation Form
  - See “Sign up for SGB Budget & Finance Committee meeting” below
- **No budget for current academic year?** - “SGA Gold Status” student organizations that did not participate in the annual budget process the previous academic year may request a budget allocation for the current academic year by:
  - Obtain and complete the SGA Budget Request Form
  - See “Sign up for SGB Budget & Finance Committee” meeting below
- **Need Money for a Conference?** – “SGA Gold Status” student organizations may request monetary assistance to attend a conference or workshop by:
  - Obtain and complete the Conference Funding Request form
  - See “Sign up for SGB Budget & Finance Committee meeting” below

## SIGN UP FOR AN SGB BUDGET & FINANCE COMMITTEE MEETING

- SGB Budget & Finance Committee meetings are held weekly throughout the academic year.
- “SGA Gold Status” student organizations may stop by the KUSSI Service Center, MSU 171 to sign up to attend an SGB Budget & Finance Committee meeting.
- Student organizations must attend an SGB Budget & Finance Committee meeting to:
  - Request additional budget funds
  - Request funding to assist in attending a conference
  - Request a budget, if an “SGA Gold Status” student organization did not receive a budget during the regular Fall budget process
  - Request to move current SGA budget money between two (2) or more expense lines within the organization’s budget
- Required forms and information must be completed and submitted to the KUSSI Service Center at least two days prior to attending the SGB Budget & Finance Committee meeting.
  - Pick up and return the appropriate forms in the KUSSI Service Center, MSU 171
  - See the sections below to determine which form to use

# ADDITIONAL FUNDING

## SIGN UP FOR SGB BUDGET & FINANCE COMMITTEE MEETINGS (Continued)

- Forms used in connection with managing budget accounts include:
  - SGA-Budget Packet: used to request an annual budget in the Fall semester.
  - Budget Request Form: used to request an annual budget (when a request was not submitted during the annual budget process).
  - Additional Allocation Form: used to request additional budget money.
  - Line Change Form: used to move budget amounts between two (2) or more budgeted expense lines.
  - Conference Request Form: used to request additional funding to assist in the expenses related to a conference.

## FORM DESCRIPTIONS

### **Additional Allocation Forms**

- Complete the form including the reason for the request for more funding and as much supporting documentation/information as possible.
- The form must be signed by both the treasurer and the advisor.
- Return the completed form to the KUSSI Service Center, MSU 171 and schedule to attend an SGB Budget & Finance Committee meeting.
- Attend the SGB Budget & Finance Committee meeting to answer questions; attendance at the meeting is limited to two representatives from the student organization. Failure to attend a meeting will result in your request not being granted.
- If requested to do so by the Budget & Finance Committee, attend the SGB Meeting to answer questions.
- Based on SGB approval of the Budget & Finance Committee recommendation, funds are awarded at this meeting.
- Any money awarded is accessed by filling out a purchase request and putting "SGB Additional Allocation" in the account/expense line area.
- Follow the normal purchase process outlined in the PURCHASING SERVICES SECTION above.

### **Conference Funding Request Forms**

- "SGA Gold Status" student organizations attending conferences (multi-day events) or workshops (single day events) may apply for conference funding.
- The SGA Conference policy should be reviewed for guidelines.
- SGA Conference Request Forms are available in the KUSSI Service Center, MSU 171.
- Complete the form and attach all necessary information. Have both the treasurer and advisor sign the form.

# ADDITIONAL FUNDING

## FORM DESCRIPTIONS (Continued)

### **Conference Funding Request Forms (Continued)**

- Return the form to the KUSSI Service Center and schedule to attend an SGB Budget & Finance Committee meeting.
- Attend the SGB Budget & Finance Committee meeting to explain the request.
- Attend the SGB meeting if requested to do so by the SGB Budget & Finance Committee.
- If SGB awards an allocation follow the PURCHASING SERVICES section to access the funding or complete a purchase request form and put "SGB Conference Allocation" on the account/expense line.

### **Line Change Forms**

- Line Change – Some student organizations have several expense lines and have funding in one but need it in another. This is not a request for more funding but rather it moves existing funding where it is needed within the existing student organization budget
- SGA Line Item Change Request Forms are available in the KUSSI Service Center, MSU 171.
- Complete the form and have it signed by both the treasurer and advisor.
- Return the form to the KUSSI Service Center, MSU 171 and schedule to attend an SGB Budget & Finance Committee meeting.
- Attend the SGB Budget & Finance Committee meeting to answer questions; attendance at the meeting is limited to two representatives from the group.
- Upon approval by the SGB Budget & Finance Committee, the line changes will be made.

# EVENT SERVICES

## CONTRACTS

- Student organizations that need to enter into contracts with vendors are required to bring all pending contracts, along with completed check request forms, to the Office for Student Union & Involvement Services, MSU 153 for review at least 2 weeks prior to the date of the event.
- All contracts negotiated by student organizations and the Office for Student Union & Involvement Services will become finalized and binding once approved and signed by the KUSSI Executive Director.
- The negotiation and finalization of contracts for services to be performed must be completed prior to the event date in order for payment procedures to be initiated.

## CASH BOXES FOR FUNDRAISING

- Cash boxes/bags may be requested by any registered student organization and/or MSU department to offer a safe and secure location to store starting money for fundraising events.

## HOW TO REQUEST A CASH BOX/BAG

- A “Cash Box Request Form” must be completed and returned to the KUSSI Service Center, MSU 171, at least twenty (24) hours prior to the fundraising event.
- The “Cash Box Request Form” will require the following information/signatures: organization name, event name/date/time, date requested/date returned, starting currency, currency denomination, signature of requestor, printed name of requestor, telephone number, e-mail address of requestor, treasurer’s signature, and advisor’s signature.
- The cash box may be picked up and dropped off during normal Service Center business hours (Monday through Friday 8am-4:30pm).
- When the cash box is picked up, a “received of petty cash” slip will be issued by KUSSI and signed by the person picking up the cash box & starting money. This slip will serve as documentation that money was received by the student organization with obligation to return those funds.
- When the cash box is dropped off, starting money originally issued will be verified by KUSSI Accounting staff, as being returned and the “received of petty cash” slip will be destroyed.

# KUSSI Quick Reference Guide

## Which to Use...Private Account or Budget Account?

**Travel Excursion:** For expenses related to a travel excursion to be paid using SGA funding (**Budget**), the trip must be well advertised and must be open to all KU students (limitations are permitted).

- Food for trip: **Private**
- Gas Reimbursement: **Budget**
- Vehicle Rental (including busses): **Budget**
- Plane Tickets: **Budget**
- Hotel Room for Students: **Budget**
- Advisor expenses: **Private**

**Please Note:** KUSI would be happy to assist you in making your hotel reservations, if a credit card is required.

- Contact a KUSI team member to coordinate working together to make the reservation.
- Please note: The KUSI credit card will only be used to **HOLD** the room.
- Complete a check request and submit the hotel confirmation as back-up.
- Some hotels will allow students to bring the check with them during the check-in process. Others will prefer that the check be mailed two weeks prior to your arrival. Please check with your hotel to be sure which method of payment is acceptable and give yourself ample time to plan and organize.

**Guest Speaker:** For expenses related to a guest speaker to be paid using SGA funding (**Budget**), the speakers' event must be well advertised and must be open to all KU students.

- Food for presentation: **Budget**
- Gift for speaker: **Private**
- Hospitality meal for speaker: **Budget**
- Meal for advisor & students: **Private**
- Hospitality/Hotel Room for speaker: **Budget**
- Transportation for speaker: **Budget**

**Ticketed Event:** To request tickets to be sold at the information desk within the Student Union Building, a KUSI Ticket Request form must be complete at least two weeks prior to the event.

- If you are planning to utilize **Budget** funds to cover expenses related to your event, ALL PROFITS WILL BE AUTOMATICALLY DEPOSITED BACK INTO THE ORGANIZATION'S BUDGET ACCOUNT.
- If you are planning to utilize the ticketed event as a fundraiser, **Private** account funds must be utilized for all expenses.

**Fundraiser: Private**

**Charity Event: Private**

**Political Event that supports a particular Party: Private**

**Group Membership Dues: Budget**

**Individual Membership Dues: Private**

**As always, please feel free to contact a KUSI team member to discuss an upcoming planned event!**

# Need help?

## Just contact us!

<u>Organization</u>	<u>Position</u>	<u>Name</u>	<u>Location</u>	<u>Phone #</u>	<u>E-mail</u>
KUSSI	Executive Director	Lisa Kowalski	MSU 173	(610) 683-4084	kowalski@kutztown.edu
KUSSI	Accounting Manager	Dawn Williams	MSU 171	(610) 683-4091	dawillia@kutztown.edu
KUSSI	Accountant	Diane Ruth	MSU 171	(610) 683-4843	ruth@kutztown.edu
KUSSI	Accounting Clerk	Jessica Rahn	MSU 171	(610) 683-4090	rahn@kutztown.edu
Office for Student Union & Involvement Services	Director	Dr. Trisha Scarcia-King	MSU 153	(610) 683-1383	scarciak@kutztown.edu
Office for Student Union & Involvement Services	Secretary	Jennifer Tanzos	MSU 153	(610) 683-1383	tanzos@kutztown.edu
Office for Student Union & Involvement Services	Asst. Director for Programming	Kristen Snyder	MSU 153	(610) 683-4043	snyder@kutztown.edu
Student Government Board	Advisor	Bob Watrous	MSU 257	(610) 683-1320	watrous@kutztown.edu
Student Government Board	President	Dan Walker	MSU 196	(610) 683-4045	dwalk325@live.kutztown.edu
Student Government Board	Vice-President	Manuel Guzman	MSU 196	(610) 683-4045	mguzm974@live.kutztown.edu
Student Government Board	Treasurer	Monet Thomas-Anderson	MSU 196	(610) 683-4045	mthom297@live.kutztown.edu
Student Government Board	Secretary	Nick Bruschi	MSU 196	(610) 683-4045	nbrus667@live.kutztown.edu
Student Government Board	Parliamentarian	Jason Correll	MSU 196	(610) 683-4045	jcorr365@live.kutztown.edu