

STUDENT ORGANIZATION EVENT & BUDGET WORKSHOP



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SUNY Downstate Health Sciences University

This presentation is available online at [FSA Forms & Documents Webpage](#)

STUDENT LIFE/FSA OFFICE KEY CONTACTS

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Office of Student Life (OSL)

- [Schuyler Hooke](#), Director of Student Life; Ext 2484
- [Adam Burgman](#), Interim Student Center Director; Ext 3293
- [Nicole Alleyne](#), Student Center Desk Supervisor; Ext 2487
- [Jacqueline Callender](#), Desk Assistant Supervisor; Ext 2487

Faculty Student Association (FSA)

- [Richard Bentley](#), FSA President; Ext 2186
- [Daniel Minnock](#), Staff Accountant; Ext 3187
- [eMail the FSA Business Office Team](#)

FORMS

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- [Student Life Website](#)
- [Café 101 Catering Order Form](#)
- [FSA Payment Form](#)
- [Organization Registration Form](#)
- [Room Request](#)
- [Soda Order Form](#)
- [Council Meeting Attendance Sheet](#)
- [Club or Event Attendance Sheet](#)
- [Community Service Form](#)
- [Event Summary Form](#)
- [Community Service Form](#)

RESERVING SPACE ON CAMPUS

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- All Room Reservations must go to [Adam Burgman](#)
 - [Room/Zoom Request Form](#)
 - Reserve space in **ADVANCE!!!**
 - ✦ Do not wait to the week of the event to reserve space
 - Reservable spaces in the Student Center:
 - ✦ Main Lounge
 - ✦ Basketball Court
 - ✦ Squash Court
 - ✦ Patio
 - ✦ Three Conference Rooms
 - [Reservable spaces in the BSB/HSEB/PHAB buildings](#)
 - [Master Calendar of Events](#)



OFF-CAMPUS EVENTS

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- All Off-Campus events need to be approved by the Office of Student Life (OSL)
- Please include all the following:
 - Date/Time/Location
 - Why the event cannot be done on campus
 - How is the event related to the mission of your organization
 - What is the cost of the event per person
 - ✦ What you want to spend money on
 - ✦ How many people would be attending (what is the limit)
 - ✦ Is it only club members or anyone on campus

ADVERTISING EVENTS

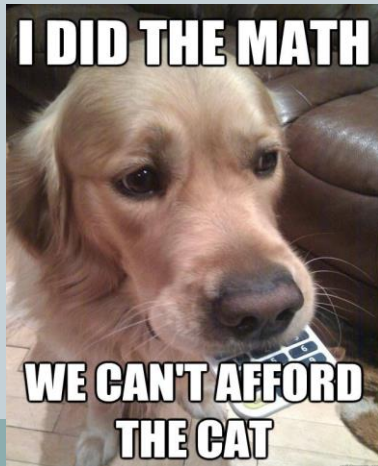
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- **Advertise your event/meetings**
 - Flyers/emails must be approved by the OSL
 - When using emails, send it BCC, copying the person who approved the advertisement
 - Must use your Downstate email account to send the email
 - Can post flyers on the bulletin boards
 - ✦ Do not use tape
 - ✦ You can print flyers and borrow staplers at the SC Information Desk
 - Include a copy of the flyer or email for all payment forms

WHERE DO YOU FIND YOUR BUDGET?

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- [FSA Forms webpage under “financial Documents”](#) has Certified Budgets and most recent SAF \$ Reports
- If you don’t understand a report or would like an update on your balance, eMail or call FSABusinessOffice@downstate.edu
 - But the Treasurer should be keeping accurate accounts of all funding spent
- Clubs/Orgs MUST ONLY have financial accounts in the Faculty Student Association (FSA).



FY2022 "Current Year" SAF Council Certified Budgets: *Click on desired Council acronym:*

[GSSC](#), [MSC](#), [NSC](#), [SCGB](#), [SoHP](#), [SPH](#), [UC](#)

No FY 2022 SAF budget submitted by MSC-Yearbook and RHC.

- [SAF Summary of Certified Budgets FYE 2022](#)

[SAF Account Authorized Signature Revision Form](#) to update the authorized signatures for Student Council Accounts

- [MSC Budget Funding Guidelines](#).
- [UC Club Budget Funding Guidelines](#)
- SAF Summary of Certified Budgets FYE 2022

FY2022 Fiscal Year to Date Actual Reports: covers 6/1/21 to 5/31/22. *Click on desired Council acronym:*

[GSSC](#), [MSC](#), [MSCYBK](#), [NSC](#), [RHC](#), [SCGB](#), [SoHP](#), [SPH](#), [UC](#)

- [SAF Report Instructions \(link\)](#). Each Council's report starts with a summary page showing accounts in Account Title alphabetical sequence, then follows with the detailed transaction report for each account in account number sequence.
 - Key to understand: In detail transaction reports, all BALANCE amounts in parenthesis (\$) means "funds are available". Balance amounts without parentheses means the account is in a deficit.
- [Understanding FSA Account Transaction Report \(link\)](#)
- Questions on your report and reporting potential discrepancies: Please Use the FSA Business Office Team eMail link in the INFO box (upper right of all FSA pages).

ON WHAT CAN I SPEND FUNDING?

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- Funding can be spent on:
 - Meetings/Events
 - ✦ Food & Drinks
 - ✦ Supplies
 - ✦ Giveaways
 - ✦ Prizes
- Need additional approval:
 - Gifts/Honoraria for a presenter
 - Conferences
- SAF Funds cannot be spent on:
 - Personal gifts for yourself/members
 - Unapproved Off-campus events
 - Donations to charities (financial or physical items)



FOOD FOR MEETINGS/EVENTS

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Food / Beverage ordered thru Student Center

Must have available funds!

- Submit food request forms to order food at least 1 week in advance
- [Café 101 Catering Form](#) – this expedites order & payment; eliminates need for a separate FSA Payment Form
- To order from one of our contracted vendors [visit the forms website](#)
 - We added 4 new menus and will continue to look for more
 - Caribbean, Empanada City, Lenny's Pizza/Italian, Mediterranean, Sauce and Cheese (Kosher)
- For all other food purchases, use the [FSA Payment Form](#) for reimbursements
- Student Center soda and paper supplies – must sign [Soda Order Form](#) and include account number
- Consider members who require Kosher, Halal, vegetarian, gluten-free or have other dietary restrictions
- Wondering how much to order? (Consult professional staff)



FUNDRAISING

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- All organizations are **ENCOURAGED** to **fundraise!** Deposit funds ASAP @ Bursar's Office – include Acct # and FULL NAME of Council and Club
- Bake sales are permitted **ONLY** when the food sold is purchased and sold in its **ORIGINAL** packaging (Home baked foods are **PROHIBITED**)
- Tournaments, classes, and other forms of fundraising are acceptable, too
- **No Raffles!**

CHARITY DRIVES

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- Canned food drives are permitted – items must be non-perishable and there must be an established time frame for the drive
 - [Food Pantry](#)
- Book drives are permitted – items cannot be text books and there must be an established time frame for the drive
- Toy drives are permitted – items must be new and unwrapped and there must be an established time frame for the drive
- Clothing drives are NOT permitted
- Must coordinate with the Student Center professional staff



GIFTS/HONORARIA FOR PRESENTERS

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- You may gift a presenter up to a value of \$45
- Med, SOHP and University Council will review speaker honoraria requests on a case-by-case basis up to \$300/event.
 - Must plan this in advance, no retroactive funding will be given to clubs
 - The speaker must be requesting the honoraria
 - Can't pay SUNY Employees



Conference Funding

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- This is not part of your annual budget request
- Must submit separate budget request to the council(s) from who you are requesting funding
- Talk to departments on campus or fundraise
 - Example – LMSA received funding for their national conference from the Office of Diversity and Inclusion
 - Other clubs have done fundraising to off-set the costs
- Each Council/Department has different restrictions on what the funding can/can't be used for
 - See the specific council guidelines for more information
- **CANNOT** retroactively ask for funding for conferences

HOW TO REQUEST ADDITIONAL FUNDING

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- All councils send out an email advertising their next meeting...

The screenshot shows an email client interface. At the top, there are five attachments: 'SDMC Honoraria Guidelines (2) (1) (1) (1).docx' (15 KB), 'Interim budget request form (2) (1) (1) (1).doc' (45 KB), 'Independent Student Project form (2) (1) (1) (1).docx' (215 KB), 'Club Trip budget (2) (1) (1) (1).docx' (215 KB), and 'Budget guidelines (2) (1) (1) (1).docx' (244 KB). Below the attachments is a section titled 'Suggested Meetings' with a '+ Get more add-ins' button. The main body of the email starts with 'Hello Friends!' and contains the following text:

The next Greater Medical Council meeting of the 2021-2022 academic year will take place on **Thursday, February 17th at 6:00 PM at the Student Center.**

The Greater Medical Council is made up of student representatives from each COM class. Our monthly meetings are a space for students to communicate directly with class leaders, administrators, and faculty. It is an opportunity for any student to voice their thoughts, comments, questions, or concerns in real time. In addition, the Greater Medical Council also reviews budget requests put forth by school clubs and organizations (**please see below for steps to submit a budget request**) during these meetings.

All are welcome to join and participate in the open portion of the meeting, starting at 6:00 PM.

Should you have any topics that you wish to be discussed at the meeting or ideas for Greater Medical Council at any time, you can share with us, anonymously or with your name, using our [form](#) or by emailing DSMedCouncil@gmail.com.

Instructions for submitting a budget request form (including an honoraria request, student trip or independent project):

- Budget request forms can be found as attachments to this email.
- Read/review the Medical Council Budget Guidelines (attached), with special attention to allocation regulations.
- Budget requests forms are to be completed and submitted by **9:00pm on Wednesday, February 16th**. Failure to submit forms on time will result in your request not being added to the council's agenda for review.
- A representative **must** attend the upcoming Greater Medical Council meeting in person on **Thursday, February 17th at 6:00 PM** to present your budget request to the council. Submitted forms will be reviewed together via a presentation. Requests without a representative will not be reviewed.
- Please submit forms via email to rachel.baum@downstate.edu, priscilla.varghese@downstate.edu, and DSMedCouncil@gmail.com by the deadline.
- Please check your account statement in the FSA office prior to attending the Greater Medical Council meeting.

Feel free to contact me directly with any questions you may have. Wishing you all an amazing rest of the week!

At the bottom of the screenshot, the status bar shows 'All folders are up to date.', 'Connected to: Microsoft Exchange', and a zoom level of '+ 100%'.

Additional Funding Request

PROJECT (Detail the program and expenses from this YR)	ATTENDANCE	EXPENSES	PROJECT (Detail the program and expenses for next YR)	EXPENSES
General body meeting, E-Board elections, introduce new members to the organization – food expenses Oct 11	20	\$146.31	General body meeting, host a panel with matched MS4 students – food expenses	\$150
Ultrasound Workshop with Dr. Dimaculangan (scheduled for March)	20	\$150	Speaker Event with Dr. Dimaculangan about anesthesia residency and careers- food expenses	\$150
			Research Speaker Event Presentation (discussing research opportunities at Downstate) – food expenses	\$150
			Health Fair- transportation	\$50
			Intubation Workshop in the Advanced Learning Resource Center- food and supplies	\$150
			Ultrasound Workshop with Dr. Dimaculangan- food and supplies	\$150

Total: \$800

FSA PAYMENT PROCESS

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- **FSA Payment Form must be used.** Exception: Café 101 Catering Form and the Soda Form is used in lieu of the payment form.
 - Obtain blank Payment Forms from the FSA forms webpage which assures most current form version.
 - Submit **TYPED** Payment Form (not hand written) with all necessary information including council name, account number/account title. Attach all supporting documentation, including the original receipts, event advertisements and the attendance sheet
- **To get the authorized signatures bring the form to the OSL**
 - Forms will be accepted in person or through email
 - ✦ If through email it needs to be 1 packet document with everything attached (not 4 separate documents) and sent to [Adam](#)
 - If we do not send a confirmation we received your form, please follow up
- **Keep a copy of your payment form and attached documentation**

FSA PAYMENT PROCESS

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- **Avoid reimbursements whenever possible**
 - When doing a reimbursement, you must include a mailing address even if you want to pick up the check in person
- **Plan in advance when you want to pay a vendor by check before the event. Checks usually require up to 2-4 weeks to process. Urgent rushes need to be discussed with the FSA Business Office staff**
 - Common payment delays are with payment forms lacking required signatures. All other supporting documentation must be submitted after the event
- **Funds must be available in the account**
- **Submit the form as soon as an expense occurs.**
- **Payment forms should be submitted no later than two weeks after your event**
- **All payment forms for current fiscal year must be submitted to the FSA Business Office by 5/24/24**
 - **Fiscal year ends 5/31/24**



FSA – SAF Payment Forms Instructions (link)

FSA001 Payment Form (link): Blank eForm is on FSA Forms webpage; Be sure to use the most current Form FSA001 version posted online!

[Online instructions link](#)

SAF Councils and Clubs General Form Instructions (MUST BE TYPED; type online then print.
(Chrome browsers require you to download form first, then type and “save as”, then print).

- A. Insert the **Student Council** name that provides the club funding
- B. **Account to be Charged:** insert the complete Account # and Title of that acct # to which this expense is intended to be charged. Some clubs have only one expense account number, while larger clubs may have multiple expense accounts.
- C. **Total Check Amount:** in dollars and cents.
- D. **Check Payable To:** the Vendor or Person’s Full Name to whom the Check is paid to.
- E. **Check box** either “Pick up completed check” or “Mail Check to”, inserting a COMPLETE mailing address.
- F. **Purpose.** Must be detailed enough so that any 3rd party reading the form months or years later can clearly understand the justification and appropriateness. It must clearly explain WHAT was purchased, WHY it was purchased, and WHERE/ WHEN it was purchased. Payments directly to vendor with detailed vendor invoice or receipt are often self-explanatory, while a Reimbursement often needs additional explanation. Attach supporting documents:

-**Food/Catering** - When using SAF funds for food: • A record of attendance is necessary. Small groups need individual names; very large groups can be described with a total of # of persons (ie: a \$500 “lunch” may be appropriate for 5-10 people depending upon venue, but would certainly NOT be appropriate for 2 people). • Original detailed invoices paid. • Itemized restaurant receipts with Credit card receipt/ statement. • Copy of approved catering order form or contract (if applicable). • Event flyer or announcement sent.

-**Individual Services Payment** • Copy of the approved engagement/contract showing the advance agreed upon cost and services to be performed. • Distinguish Contractor payments with any applicable IRS form such as W9. IRS Factors of the Common Law Test (20 Q’s form). May not pay salary, bonuses, or any form of remuneration directly to State employees working as part of their state obligation; Such payments must flow through a State IFR. Account holders who plan to pay employees must discuss in advance with the FSA Business Office and receive advance approval for the appropriate process.

-**Travel related reimbursements:** Student Councils often have detailed parameters for travel related costs, and need council meeting minutes approving reimbursements. Indicate purpose of travel, and most economical means of travel shall be used, with supporting receipts.

-**Imprinted Clothing:** Coordinate all purchases through University Bookstore.

-**Gift Cards:** any type -must clearly justify a purpose as well as the recipient(s) of the said gift and/or gift cards. If recipient is not known up front (prizes at an event), must submit recipients immediately following the event.


-**Council Approval:** Some transactions and accounts, esp use of “Programs & Projects”, or “Spontaneous” accounts, or additional funding needed, require the Council’s approval by attaching official (signed) Council meeting minutes. Payments from acct titles similar to “programs and projects”, reserve funds, or funding transfers require supporting Council meeting minutes, showing Council approved “motions”. If your Council submitted final signed meeting minutes, they will be posted online at [Student Council Meeting Minutes webpage \(link\)](#). If the Student Council minutes are posted on that webpage, then you don’t need to attach a copy of the minutes. Instead, include words “Approved by (Council name) at their (date) meeting” in the Payment Form “purpose” section.

- G. **Signatures:** Each Council /Club has slightly different authorized signature requirements. You need to know the signature requirements of the council providing funds to your club.

Submitting: Always save a copy of what you submit.

- The Student Center Director/Student Activities Office (Stu Ctr Rm 2-06) can assist in getting signatures. They will submit completed signed document to FSA, or
- If complete with all attachments and signatures, can be submitted directly @ FSA BusinessOffice (StuCtr Rm 2-09).
- If submitting via eMail MUST be from a Dowstate.edu eMail address of authorized signator.

Questions on filling out a payment form? eMail link



**Faculty Student Association (FSA)
Payment Form**

FSA Office Use Only

Check #: _____

Check Date: _____

Typed Forms Only: Submit completed form to Business Office; mail to MSC1219 or hand deliver to Student Center, Room 2-09. An advance copy by fax or scan eMail can initiate processing, but check will not be disbursed until fully signed hard copy is received. Instructions link.

DATE Prepared: (insert todays date) _____ (Account Type check one)

FSA Direct Operation
 FSA Trust and Agency (T&A)
 FSA Student Activity Fund (SAF)

Check SAF

ORGANIZATION, DEPT. or STUDENT COUNCIL NAME: **A** _____

ACCOUNT NUMBER TO BE CHARGED: **B** _____ Account Title/Club Name: **B** _____

TOTAL Check Amount: **C** _____ CHECK PAYABLE TO (Payee Name): **D** _____

check one PICK UP CHECK AT FSA OFFICE or mail check to:

1) Attach Original Invoice(s)
2) Attach Any/All Receipt(s) for Goods or Services

E Address: _____

City, State, Zip: _____

F

PURPOSE Must be a specific and clear description of this payment/ transaction. Attach any and all applicable supporting documentation, such as letters of explanation/ justification, invoices, meeting minutes, contract, etc. Note: Advances, when approved, may be issued with receipts to be submitted. Failure to submit receipts will result in account being frozen.

G

Authorized Signature: _____ ORGANIZATION Title: _____

WHEN JOINT SIGNATURE IS REQUIRED BY ORGANIZATION:

Authorized Signature: _____ ORGANIZATION Title: _____

This section is for FSA OFFICE USE ONLY:

ACCOUNT NUMBER	ACCOUNT TITLE	DEBIT	CREDIT

Check Received By: _____ Date: _____ FSA.001 [5/15]

MC/UC ANNUAL BUDGET MEETING

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- Annual Joint Med/University Council – date TBD (Spring)
 - This will be a Zoom meeting
- This will be the budget for June 2024 to May 2025
 - Student Organization budget requests will be due the week before the meeting
 - When you submit your budget you will sign up for a time slot
 - ✦ Please log-on 10 minutes before your allotted time
 - Rollover requests must be made at this meeting
 - ✦ Only eligible for rollover if you do fundraising or get grants/donations
- Other Councils will discuss their budget during their council meetings



MC/UC ANNUAL BUDGET FORM



Budget Request Form – June 1st 2024 to May 31st 2025

Please check all that apply: Med-Council Funding and/or University Council Funding

ORGANIZATION NAME: _____ PRESIDENT: _____ TREASURER: _____

Are you requesting rollover? Yes or No If Yes, how much of your current budget is donated, fundraised or grant money? _____

PAST AND SCHEDULED EVENTS: (Detail programs and expenses from this year 2023-2023)	ATTENDANCE	EXPENSES	PROJECTED EVENTS AND COSTS FOR THE 2023-2024 YEAR	ANTICIPATED EXPENSES
Total:			Total:	

PLEASE TYPE ALL INFORMATION

GET INVOLVED WITH OUR PROGRAMS!

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- Bring your organization to campus/virtual events to promote team-building etc.
- If you are interested in co-sponsoring an event, speak to Adam Burgman.
- Use the Student Center for meetings, programs, fitness, and relaxation
- Help us to know you!
Stop by and say hello



Questions

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