

STUDENT ORGANIZATION EVENT & BUDGET WORKSHOP



SCHUYLER HOOKE

DIRECTOR, STUDENT LIFE
718-270-2484

ADAM BURGMAN, M.ED.

DIRECTOR OF STUDENT ACTIVITIES
AND THE STUDENT CENTER
718-270-3293

ZAINAB “ZEE” AKANNI, M.A.

ASSISTANT DIRECTOR OF
STUDENT ACTIVITIES
718-270-2485

SUNY Downstate Health Sciences University

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

STUDENT LIFE/FSA OFFICE KEY CONTACTS

2

Office of Student Life (OSL)

- [Schuyler Hooke](#), Director of Student Life; Ext 2484
- [Adam Burgman](#), Director of the Student Center and Student Activities; Ext 3293
- [Zainab “Zee” Akanni](#), Assistant Director of Student Activities; Ext 2485
- [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](#)

RESERVING SPACE ON CAMPUS

3

- All Room Reservations must go to [Adam Burgman](#)
 - [Room/Zoom Request Form](#) - including off-campus events
 - Reserve space in ADVANCE!!!
 - ✦ Do not wait to the week of the event to reserve space
 - Reservable spaces in the Student Center:
 - ✦ Two Lounges
 - ✦ Basketball Court
 - ✦ Squash Court
 - ✦ Patio
 - ✦ Three Conference Rooms
 - [Reservable spaces in the BSB/HSEB/PHAB buildings](#)
 - ✦ Certain conditions will require a Facilities Use Application
 - [Master Calendar of Events](#)



Changes to Listserv Access (Effective January 1, 2025)

4

- As part of our institutional effort to reduce the amount of group emails sent to students, starting January 1, 2025, student organizations will no longer be permitted to use the Downstate student listservs to advertise events.
- OSL is taking the following steps to help with the transition:
 - We will increase advertisement for the **master calendar of events**
 - OSL has created a **weekly advertisement** showcasing all student organization events.
- As an Organization you can still:
 - Create flyers to post around campus
 - Email members who signed up for your organization
 - Use/create group chats
 - Use your social media platforms.
- OSL will also send a regular email (at least once a semester) and post on the website how students can reach out to individual student organizations to ask to be added to (or removed from) their member email lists.
- We are looking into a 3rd party platform specially designed for Student Organizations/events

Required Statements for Flyers and Publicity

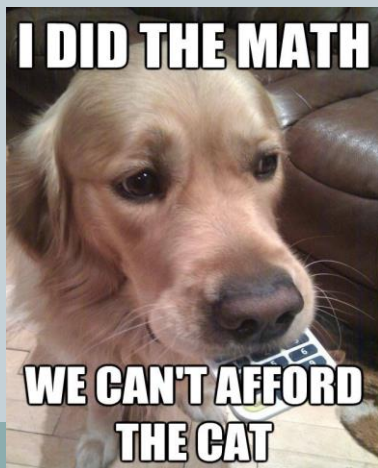
5

- All event publicity (flyers, emails, group chat posts or social media posts) must clearly include the following bolded statements:
 - **For accommodations or questions regarding an event, please email StudentCenter@downstate.edu.** If your organization has a dedicated email, you can include it alongside the Student Center email (e.g., StudentCenter@downstate.edu and yourclub@downstate.edu).
 - **Events sponsored by student clubs and organizations do not necessarily imply endorsement by SUNY Downstate Health Sciences University of the views, opinions, or activities of the speakers, presenters, or organizers.**
 - If your event is funded using student activity fee funding, you must also include: **Funded by the Mandatory Student Activities Fee.**
- To help advertise events, the Office of Student Life will:
 - Highlight the [master calendar](#) of events
 - Create and send a weekly listing of all student organization events for the following week.
 - ✦ Club leaders must complete the [Event Listing Submission Form](#) to have events promoted on the listing.
- Can ONLY post flyers on the bulletin boards
 - Do not use tape
 - Do not cover up flyers that are already posted
 - You can print flyers and borrow staplers at the SC Information Desk

WHERE DO YOU FIND YOUR BUDGET?

6

- [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
 - 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).

7

-
- A large, diverse assortment of fresh fruits, vegetables, and processed food items arranged together on a white background. The items include bananas, broccoli, tomatoes, bell peppers, kiwi, grapes, lemons, bread, ham, eggs, and various bottles of oil, vinegar, and juice.

FOOD FOR MEETINGS/EVENTS

8

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](#)
 - Caribbean, Empanada City, Lenny's Pizza/Italian, Mediterranean, Pizza Heights BK (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)



SUPPLIES/GIVEAWAYS/PRIZES

9

- If you need to order supplies for an event please reach out to Adam to assist you
 - Two weeks before your event
 - We have a tax-free Amazon account
 - If not on Amazon, we can assist you with a tax-exempt form
- Giveaways for events need to be approved
- If you are giving a gift card as a prize, make sure you record the recipient on the payment form



Submitting Amazon Order

10

- **Go to Your Lists on the Amazon Website**
 - Hover over "**Account & Lists**" in the top-right corner of the page.
 - Click on "**Create a List**" under the "**Your Lists**" section.
 - A pop-up will appear asking you to name your list. Enter a name (e.g., "Tea Time Event")
 - Click on "**More or ...**" (next to the list name) then "**Manage List.**"
 - Adjust settings such as:
 - ✦ **Privacy:** Private, Public, or Shared (only those with a link can view).
 - ✦ **Click – “Keep Purchased Items on Your List”**
 - Click "**Save Changes.**"
- **Adding Items to Your Wishlist**
 - Browse Amazon and go to the product page of an item you want.
 - Click "**Add to List**"
 - ✦ Below the "**Add to Cart**" button, click "**Add to List.**"
 - ✦ Select the Wishlist you want to save it to.
- **Adding Notes**
 - You can add notes to each item (e.g., “I need this in size M” or “Any color is fine”).
 - Click “**Edit**” under an item and type in the "**Comments**" section.
- **Send your list to Adam or Zainab by clicking "Send List to Others"**

FUNDRAISING

11

- All organizations are **ENCOURAGED** to fundraise!
Deposit funds ASAP @ Bursar's Office – include Acct # and FULL NAME of Council and Club
- Cannot use personal Venmo, Paypal etc.
 - The FSA office can make a paypal link to put on your website, need about 2-4 weeks prior to your event to activate
- Bake sales are permitted **ONLY** when the food store bought (Home-baked foods are **PROHIBITED**)
- Tournaments, classes, and other forms of fundraising are acceptable, too
- SAF can not be given to a charity
- Total raised (minus) money spent = fundraised total
- No Raffles!

CHARITY DRIVES

12

- Must coordinate with the Student Center professional staff
 - No more than a two week collection period
- Canned food drives are permitted – items must be non-perishable
 - [Food Pantry](#)
- Book drives are permitted – items cannot be text books
- Toy drives are permitted – items must be new and unwrapped
- Clothing drives are permitted – items must be new/clean. Please use gloves and trash bags when going through the collection bins

HOW TO REQUEST ADDITIONAL FUNDING

13

- 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 Honoria 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' link. The email body starts with 'Hello Friends!' and announces the next Greater Medical Council meeting for Thursday, February 17th at 6:00 PM at the Student Center. It describes the council's purpose and provides instructions for submitting budget requests, including a list of bullet points. The email ends with a friendly sign-off and a status bar at the bottom indicating 'All folders are up to date.' and 'Connected to: Microsoft Exchange'.

Attachments:

- SDMC Honoria 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)
- Budget guidelines (2) (1) (1) (1).docx (244 KB)

Suggested Meetings + Get more add-ins

Hello Friends!

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!

All folders are up to date. Connected to: Microsoft Exchange

Additional Funding Request

14

| 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

GIFTS/HONORARIA FOR PRESENTERS

15

- You may gift a presenter an item up to a value of \$45
 - No gift cards to non-Downstate presenters
- Med, SOHP, and University Councils 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

16

- This is not part of your annual budget request
- Must submit separate budget request to the council(s) from who you are requesting funding before the conference
- CANNOT retroactively ask for funding for conferences
- 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

OFF-CAMPUS EVENTS

17

- All Off-Campus events need to be approved by the Office of Student Life (OSL)
- Please fill out the [Off-Campus Event Request Form](#)
- All approvals are case by case



FSA PAYMENT PROCESS

18

- 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
- Bring form to the OSL to get the authorized signatures
 - 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 and Zee
 - If you do not receive a confirmation please follow up
- Keep a copy of your payment form and attached documentation

FSA PAYMENT PROCESS

19

- 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
- 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 5/23/25
 - Fiscal year ends 5/31/25



FSA – SAF Payment Forms Instructions (link)

20

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.

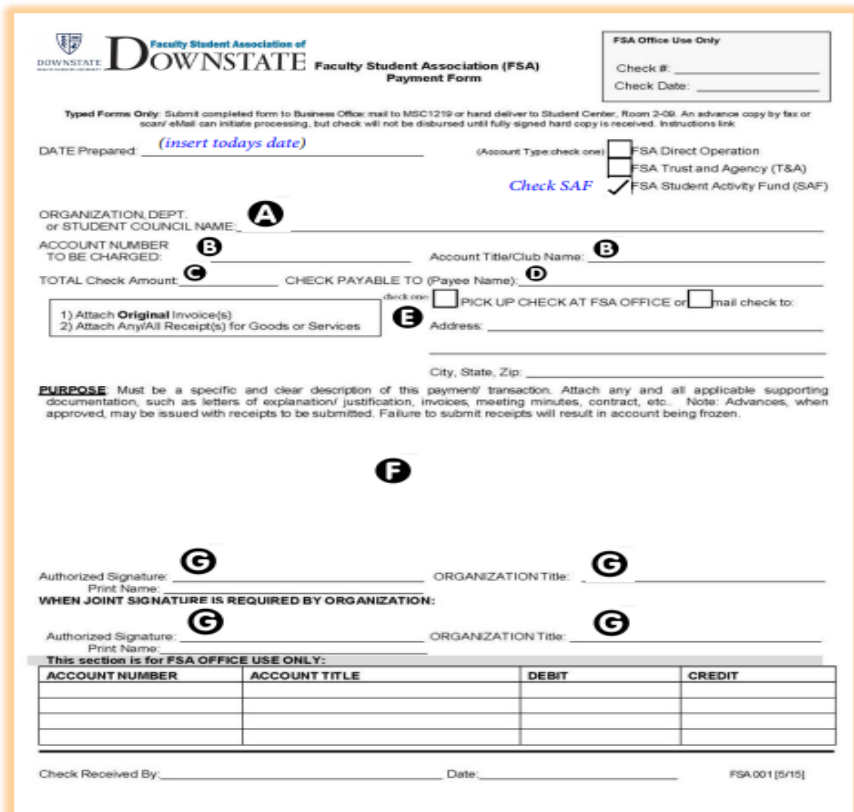
-**Council Approval:** Some transactions and accounts, esp use of "Programs & Projects", or "Spontaneous" accounts, or additional funding needed, require the Council's approval by attaching official (signed) Council meeting minutes. Payments from acct titles similar to "programs and projects", reserve 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](#)

The image shows a sample of the FSA001 Payment Form. It includes fields for 'DATE Prepared', 'ORGANIZATION, DEPT. or STUDENT COUNCIL NAME', 'ACCOUNT NUMBER TO BE CHARGED', 'TOTAL Check Amount', 'CHECK PAYABLE TO (Payee Name)', 'Address', 'City, State, Zip', 'Authorized Signature', and 'ORGANIZATION Title'. There are also checkboxes for 'Check SAF' and 'Check Date'. A table at the bottom is labeled 'This section is for FSA OFFICE USE ONLY:' and has columns for 'ACCOUNT NUMBER', 'ACCOUNT TITLE', 'DEBIT', and 'CREDIT'. The form is marked with letters A through G corresponding to the instructions on the right.

MC/UC ANNUAL BUDGET MEETING

21

- Annual Joint Med/University Council - April 23, 2025
 - This will be a Zoom meeting
- This will be the budget for June 2025 to May 2026
 - 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 budgets during their council meetings



University Council Budget Process

22

- 2024-25 – new budget process



GET INVOLVED WITH OUR PROGRAMS!

23

- Bring your organization to campus/virtual events to promote team-building etc.
- If you are interested in co-sponsoring an event, speak to Adam or Zee
 - Please note we plan our events 2-3 months ahead
- Use the Student Center for meetings, programs, fitness, and relaxation
- Help us to know you! Stop by and say hello!



Questions

24

