

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](#), 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 Tonge](#), Desk Assistant Supervisor; Ext 2487

Faculty Student Association (FSA)

- [Daniel Minnock](#), Staff Accountant; Ext 3187
- [email the FSA Business Office Team](#)

RESERVING SPACE ON CAMPUS

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- All Room Reservations are to be submitted through Engage
 - [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 (Main & Recovery)
 - ✦ Basketball Court
 - ✦ Squash Court
 - ✦ Patio
 - ✦ Three Conference Rooms
 - [Reservable spaces in the BSB/HSEB/PHAB buildings](#)
 - ✦ Certain conditions may require a Facilities Use Application
 - ✦ Carrells are not for Student Organization Events (Academic Only)
 - [Master Calendar of Events](#)
 - Please see the Nuts & Bolts presentation about posting flyers on campus and creating events on Engage



CLUB COUNCIL BUDGET TABLE

MEDICAL COUNCIL

- Addiction Medicine Club
- Adversity in Medicine Support Group (AIM)
- American Association of Neurological Surgeons (AANS)
- American Medical Association Medical Student Local Campus Section at SUNY Downstate
- American Medical Women's Association (AMWA)
- Anesthesia Society at Downstate
- Asian Pacific AMSA (APAMSA)
- Association of Women Surgeons
- Brooklyn Free Clinic (BFC)
- Building the Next Generation of Academic Physicians (BNGAP)
- Cardiology Interest Group
- Cardiothoracic Vascular Surgery Interest Group (CTVSIG)
- Chinese American Medical Society (CAMS)
- Critical Care Medicine Interest Group
- Daniel Hale Williams Society (DHWS)
- Dermatology Interest Group at Downstate
- Emergency Medicine Interest Group
- ENT/ Otolaryngology Club
- Family Medicine Interest Group
- First Generation Health Professionals
- Gastroenterology Interest Group (GIG)
- Global Surgery Student Alliance at SUNY Downstate
- Internal Medicine Interest Group (IMIG)
- Latino Medical Student Association (LMSA)
- Lifestyle Medicine Interest Group (LMIG)
- OB/GYN Society at Downstate
- Oncology Club
- Ophthalmology Club
- Orthopedics and Sports Medicine Club
- Peds R US
- Physical Medicine and Rehabilitation Interest Group
- Physicians for Human Rights @ Downstate
- Plastic and Reconstructive Surgery Interest Group (PRSIG)
- Psychiatry Student Interest Group
- Radiology Club
- Student Interest Group in Neurology (SIGN)
- Students for Artificial Intelligence in Medicine (SAIM)
- Surgical Society at Downstate
- Ultrasound Interest Group at Downstate
- Urology Club at Downstate
- Wilderness Medicine Club

STUDENT CENTER GOVERNING BOARD

- American Sign Language Club at Downstate
- Art Installation Society at Downstate (DAIS)
- Badminton Club at Downstate
- Chess Club at Downstate
- Christian Fellowship
- Haitian Creole Language Club
- Maimonides Society
- Maker Club
- Medical Artists Guild/Brooklyn Stories
- Music Club at Downstate
- Muslim Students Association (MSA)
- Organization of South Asians at Downstate (DOSA)
- Photography Club
- PRIDE Club
- Runners Club at Downstate
- Volleyball Club at Downstate

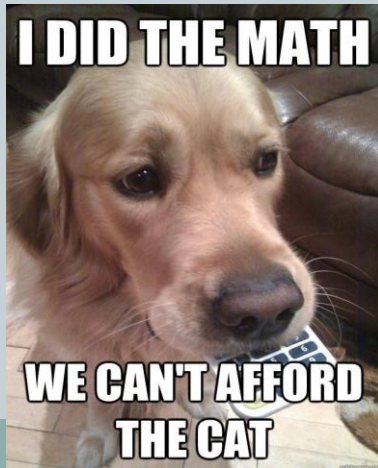
UNIVERSITY COUNCIL

- Black Men in White Coats (SUNY Downstate Chapter)
- Brooklyn Free Clinic (BFC)
- Dialysis Sidekicks Program at Downstate
- Ethics Society at Downstate
- Global Health Club
- Initiative for Nutritional Empowerment at Downstate (DINE)
- Medical Entrepreneurship Club at Downstate (MEC)
- Project TEACH @ SUNY Downstate
- Sexual Health, Education, and Advocacy (SHEA)
- Street Medicine Outreach Association at Downstate (DSMOA)
- Students for a National Health Program (SNaHP)
- Students for Choice at Downstate
- Students for Justice in Palestine (SJP)
- Students for Social Responsibility (SSR)

WHERE DO YOU FIND YOUR BUDGET?

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- [FSA Forms webpage under “Financial Documents”](#) has Certified Budgets and most recent SAF money 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).

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 on engage
- [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

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- If you need to order supplies for an event, please reach out to [Adam](#) & [Zainab](#) 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

- **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., "Teatime 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](#) & [Zainab](#) by clicking "Send List to Others"**

OFF-CAMPUS EVENTS

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- All Off-Campus events need to be approved by the Office of Student Life (OSL)
- Please fill out the [Off-Campus Event Request Form](#) and submit it on engage at least 2-3 weeks prior to the event
- All approvals are case by case



GUEST SPEAKER EVENT

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- If you are bringing a Non-Downstate speaker to campus you **MUST** email the below information Adam at least 3-4 weeks in advance:
 - Name
 - Contact information
 - Social media/LinkedIn
 - ✦ Virtual events only need 1 week notice
- You may gift a presenter an item up to a value of \$45
 - No gift cards to non-Downstate presenters
- 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



Zoom/Virtual Event Policy

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- Please fill out the room request form and put Zoom as the room preference
- All events require pre-registration using your Downstate.edu account
 - All Zoom events are for Downstate students/staff, unless approved to collaborate with an outside organization
 - ✦ Example – joint panel with SUNY Upstate students
- Individuals admitted to the event should be force muted and only able to unmute by request
- Host should block or kick anyone being disruptive
 - Alert OSL staff if problem continue

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, there is a status bar that reads 'All folders are up to date. Connected to: Microsoft Exchange' and a zoom level of '+ 100%'.

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 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



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
- 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!

PAYMENT PROCESS

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- **The FSA Payment Form must be used**
 - Obtain blank Payment Forms from the FSA forms webpage which assures most current form version.
 - Do NOT use old files passed down to you from the previous executive board
 - Submit **TYPED** Payment Form (not hand written) with all necessary information
 - Top Line: Council name (NOT CLUB)
 - Under that is where your account number and Club name go account title.
 - Sign in one of the two spots Authorized Signature lines
 - Cannot sign your own reimbursement
 - Attach all supporting documentation
 - Original receipts
 - Event advertisements
 - Attendance sheet
- **Submit the completed package on Engage**
 - Merge into one Document
- **Exceptions: Café 101 Catering Form and the Soda Form is used in lieu of the payment form**

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).

- Insert the **Student Council** name that provides the club funding
- 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.
- Total Check Amount:** in dollars and cents.
- Check Payable To:** the Vendor or Person’s Full Name to whom the Check is paid to.
- Check box** either “Pick up completed check” or “Mail Check to”, inserting a COMPLETE mailing address.
- 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.

- 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 of DOWNSTATE 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** _____

PICK UP CHECK AT FSA OFFICE or mail check to:
1) Attach Original Invoice(s) **E** _____
2) Attach Any/All Receipt(s) for Goods or Services _____
Address: _____
City, State, Zip: _____

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.

F _____

Authorized Signature: **G** _____ ORGANIZATION Title: **G** _____

WHEN JOINT SIGNATURE IS REQUIRED BY ORGANIZATION:

Authorized Signature: **G** _____ ORGANIZATION Title: **G** _____

This section is for FSA OFFICE USE ONLY:

ACCOUNT NUMBER	ACCOUNT TITLE	DEBIT	CREDIT

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

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.**
 - Alert us when submitting the form if it is urgent and needs to be rushed
 - As this is a check prior to your event, all other supporting documentation must be submitted after the event to the FSA Business office copying the OSL staff
- **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 should be submitted to the FSA Business Office by 5/27/26**
 - Fiscal year ends 5/31/26

ANNUAL BUDGET MEETINGS

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- **Med Council, Student Center Governing Board and University Council**
 - University Council – 7pm – April 13th
 - Med-Council – 6pm – April 15th
 - SCGB – 7pm – April 27th
 - ✦ If you don't submit a budget, you will have to attend their monthly meetings in the fall to request funding
- **CON, GSSC, SOPH, SPH, RHC**
 - Their budget meetings will take place in their May Council meetings
- **Rollover requests must be made at this meeting**
 - Only eligible for rollover if you fundraised or received grants/donations
 - Must identify how much of your current budget left is the fundraised amount

GET INVOLVED WITH OUR PROGRAMS!

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- Bring your organization to campus/virtual events to promote team-building etc.
- If you have an event idea and need help executing it, we can help you!!!
 - 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

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