STUDENT ORGANIZATION
EVENT & BUDGET WORKSHOP

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SUNY Downstate Health Sciences University
This presentation is available online at FSA Forms & Documents Webpage
Office of Student Life (OSL)
- Schuyler Hooke, Director of Student Life; Ext 2484
- Adam Burgman, Director of the Student Center; 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
• 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
RESERVING SPACE ON CAMPUS

- 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
ADVERTISING EVENTS

- 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?

- 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).
ON WHAT CAN I SPEND FUNDING?

- 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 / 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, 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)
If you need to order supplies for an event please reach out to Adam or Schuyler 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
FUNDRAISING

- 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 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

- Must coordinate with the Student Center professional staff
- 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 permitted – items must be new/clean. Please use gloves and trash bags when going through the collection bins
HOW TO REQUEST ADDITIONAL FUNDING

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

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 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.bowen@downstate.edu, priscilla.vargas@downstate.edu, and DSMedCouncil@gmail.com by the deadline.
- Please check your account statement in the PSA 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!
## Additional Funding Request

<table>
<thead>
<tr>
<th>PROJECT (Detail the program and expenses from this YR)</th>
<th>ATTENDANCE</th>
<th>EXPENSES</th>
<th>PROJECT (Detail the program and expenses for next YR)</th>
<th>EXPENSES</th>
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<tbody>
<tr>
<td>General body meeting, E-Board elections, introduce new members to the organization – food expenses Oct 11</td>
<td>20</td>
<td>$146.31</td>
<td>General body meeting, host a panel with matched MS4 students – food expenses</td>
<td>$150</td>
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<td>Ultrasound Workshop with Dr. Dimaculangan (scheduled for March)</td>
<td>20</td>
<td>$150</td>
<td>Speaker Event with Dr. Dimaculangan about anesthesia residency and careers- food expenses</td>
<td>$150</td>
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<td>Research Speaker Event Presentation (discussing research opportunities at Downstate) – food expenses</td>
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<td>Health Fair- transportation</td>
<td>$50</td>
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<td>Intubation Workshop in the Advanced Learning Resource Center- food and supplies</td>
<td>$150</td>
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<td>Ultrasound Workshop with Dr. Dimaculangan- food and supplies</td>
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**Total: $800**
GIFTS/HONORARIA FOR PRESENTERS

- You may gift a presenter up to a value of $45
- 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

- 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

- 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 (set a limit)
    - Is it only open to club members or anyone on campus
  - All approvals are case by case
**FSA PAYMENT PROCESS**

- **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 from 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
    - If you do not receive a confirmation please follow up

- **Keep a copy of your payment form and attached documentation**
FSA PAYMENT PROCESS

- 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 5/24/24
  - Fiscal year ends 5/31/24
FSA – SAF Payment Forms Instructions (link)

FSA001 Payment Form (link): Blank eForm is on FSA Forms webpage;

**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).)

Be sure to use the most current Form FSA001 version posted online!

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 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 may 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 and services to be performed. • Distinguish Contractors and payments with any applicable IRS form such as W-9. • 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 should be able 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, exp. 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. 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 signatures, can be submitted directly @ FSA Business Office (StuCtrRm 2-09).
- If submitting via eMail MUST be from a Dowstate.edu eMail address of authorized signer.

**Questions on filling out a payment form? eMail link**
MC/UC ANNUAL BUDGET MEETING

• Annual Joint Med/University Council – April 2024
  ○ 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 budgets during their council meetings
Budget Request Form – June 1st 2024 to May 31st 2025

Please check all that apply:  ____ Med-Council Funding  ____ 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? ____________

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<tr>
<th>PAST AND SCHEDULED EVENTS:</th>
<th>ATTENDANCE</th>
<th>EXPENSES</th>
<th>PROJECTED EVENTS AND COSTS FOR THE 2023-2024 YEAR</th>
<th>ANTICIPATED EXPENSES</th>
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Total:                                        Total:
GET INVOLVED WITH OUR PROGRAMS!

- 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
  - 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:

Thank you for listening!

Any questions?