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**, 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

- 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

- 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

- 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

• 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**
  - 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).

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**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 ($) mean “funds are available”. Balance amounts without parentheses mean the account is in a deficit.
  - **Understanding SAF 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?

- 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

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)
SUPPLIES/GIVEAWAYS/PRIZES

- If you need to order supplies for an event please reach out to Adam or Schuyler to assist you
  - We have a tax-free Amazon account
  - If the supplies aren’t 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
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

- 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

- 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

- 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
All councils send out an email advertising their next meeting...
### Additional Funding Request

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>ATTENDANCE</th>
<th>EXPENSES</th>
<th>PROJECT</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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<tr>
<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>
<td>$150</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>
<td>$150</td>
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<td><strong>Total</strong>: $800</td>
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**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.

- 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

- 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)

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 5000 “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 Contractual 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 IR. Account holders may input payments to pay employees to 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 gift and/or gift cards. If recipient is not known upfront (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, showing Council approved “motion”. 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 documents 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 Downstate.edu eMail address of authorized signer.

Questions on filling out a payment form? eMail link
• 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
**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? __________

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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>ANTIPIATED EXPENSES</th>
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**Total:**

PLEASE TYPE ALL INFORMATION
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.
- Use the Student Center for meetings, programs, fitness, and relaxation
- Help us to know you!
  Stop by and say hello
THANK YOU FOR LISTENING!

ANY QUESTIONS?