



Lehigh University Student Senate
Allocations Guidelines, Student Clubs and Organizations

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I. Eligibility and Expectations

- A. Eligibility for Appropriation of Funds
 1. The Lehigh University Student Senate must recognize the organization.
 2. The organization must submit budgets within the designated time frames to the Allocations Committee, detailing all of the organization's revenue and proposed expenses.
 3. Unless designated as a "special organization," the organization's president and treasurer must complete the financial workshop offered by the Office of Student Accounts.
 4. The organization must keep an updated list of club officers on file with the Student Accounts Coordinator.
 5. The organization must agree to follow the policies of the Office of Student Accounts and the Allocations Committee, including those defined in these guidelines.
- B. Expectations of Senate Funded Organizations
 1. Senate funds are only intended to supplement an organization's operating budget, not be its only source. Therefore, all organizations are strongly urged to fundraise.
 - a. Fundraising options include:
 - (i) Collecting dues from members
 - (a) Service-orientated organizations are exempt from this expectation.
 - (ii) Obtaining additional funds or other assistance from academic departments and administrative offices
 - (iii) Inviting other Senate recognized organizations to co-sponsor events
 - (iv) Receiving donations or grants from outside sources
 - (v) Hosting fundraising events
 2. All organizations are required to host at least one (1) event per year that benefits the greater Lehigh community.
 3. All events must be adequately advertised so as to remain open to the entire student body.
 4. All events should be related to the purpose of the organization.
 - a. Refer to the charter of the organization to verify.
 5. Any and all equipment purchased must be inventoried for later use.
 6. Student Senate must be formally recognized for its support of each event. This applies to advertisements and any promotional material distributed at the event itself.
 7. All requests must be submitted in a timely fashion.
 8. All expenses must be fully documented.
 9. All communications with the Treasurer and/or Allocations Committee must be via e-mail to treasurer@lehigh.edu.

- a. New Event and Co-Sponsorship requests are the exceptions, as they must be submitted electronically via the funding request feature on the Hub on an individual club or organization's group page.
- b. The Treasurer shall, with the intent of alleviating concerns and ensuring communication between the Allocations Committee and the student body, make him or herself available to any interested party with questions regarding funding decisions.

II. Evaluation Criteria

- A. The Allocations Committee will evaluate all funding requests with particular regard to the following, in no particular order:
 1. Mission of the organization
 2. Possible duplication of other organizations' activities
 3. Proposed expenditures
 4. Benefit to the undergraduate community
 5. Benefit to the undergraduate members of the organization
 6. Promotion of the club's mission
 7. Benefit to Lehigh community as a whole
 8. Present and future leadership of the organizations
 9. Number of club members
 10. Expected attendance at events
 11. Fundraising efforts during the prior year
 12. History of group
 13. Availability of funds, both in the Student Life Series Fund and the club's account
 14. Past levels of activity
 15. Manner in which previous funds were used
 16. Benefit the health and wellbeing of those participating in the event
- B. The Allocations Committee reserves the right to use its discretion when making any and all types of funding decisions, unless these guidelines or Senate doctrine expressly state otherwise.
 1. The committee may deem it necessary to curtail spending for certain items, such as transportation or food/refreshments, if they monopolize an organization's expenses.

III. Budgetary Process

- A. New Club Appropriations
 1. Following initial Senate recognition, a new club will be held under a preliminary budget period of 15 weeks in which the probationary organization will receive a maximum of one hundred and fifty dollars (\$150.00) in Senate funding.
 - a. Further funding may be obtained via the Co-Sponsorship Fund.
 2. After satisfactory completion of the above requirement, and upon holding an initial meeting, an organization may submit a budget to the Allocations Committee to receive funding as a fully recognized club.
 - a. This final step is contingent upon official recognition by Student Senate as a whole.
- B. Preparation and Submission of Budgets
 1. The provisions for preparing and submitting budgets differ for regular and special organizations.
 2. Consult the appropriate material, made available by the Allocations Committee, regarding proper format and procedure.
- C. Budget Evaluation Process
 1. The following process will be applied to both regular and special organizations:
 - a. Upon submission of an organization's budget via the Hub, the Treasurer shall schedule a budget hearing, which may consist of the following:
 - (i) A closed hearing at which the Allocations Committee will evaluate the budget and decide on a recommendation to the full Senate for the appropriate level of funding
 - (ii) An open hearing requested by the Allocations Committee at which the organization's officers present their budget and address any concerns
 - (a) Open hearings may be open to the general public, including, but not limited to, other Senators serving as non-voting members.
- D. Past Deadline Budgets

1. If a fully recognized organization fails to meet the deadline for budget submission, there will be a second allocation period during the fall semester.
 - a. Past deadline budgets will be reviewed under the same criteria as all others.
 - (i) In order to encourage responsible planning and facilitate leadership transition, ten percent (10%) of the final funded amount will be withheld.
 - b. Any existing organization that submits a budget after the second deadline will not be eligible to receive Student Life Series funding for the fiscal year under consideration.
 - (i) Under extenuating circumstances, the Allocations Committee may accept budgets past the second deadline and withhold twenty-five percent (25%) of the allocated amount.
- E. Supplemental Budgets
1. Although the Allocations Committee expects clubs to make efficient use of the budget initially allocated, additional funding may be granted to especially active organizations.
 2. In order to receive additional funding, an organization must submit a Supplemental Budget to the Student Senate Treasurer via e-mail.
 - a. The Supplemental Budget shall be prepared in the same manner as laid out in *Section III.B*.
 - b. Only one Supplemental Budget may be submitted per fiscal year.
 3. The evaluation criteria for the appropriation of additional funding are as follows:
 - a. The organization's spending of, or firm dedication to spend, all allotted Senate funds on events outlined and approved in the initial budget
 - b. All relevant criteria listed in *Section II*, especially the availability of reserve funds
 4. Supplemental Budgets will be reviewed by the Allocations Committee on a rolling basis.
 - a. The final deadline for additional funding will be decided upon by the Treasurer.
- F. Reallocation
1. The Allocations Committee realizes that some flexibility is needed concerning the budgeting process. Many budgets are completed by previous officers and changes are sometimes necessary. Understanding this, the committee has the discretionary power to allow for the reallocation of previously approved funds.
 2. If a club finds the need to reallocate funds, an officer should e-mail a request to the Student Senate Treasurer.

IV. Alternative Senate Funding Options

- A. All alternative funding requests must be submitted no later than two (2) weeks prior to the event for which the request is made.
 1. If the above requirement is not met, the Allocations Committee may impose penalties including, but not limited to, withholding a percentage of the funded amount.
- B. New Event Requests
 1. Organizations that require approval for expenditure of allotted funds for unanticipated expenses or events may submit an electronic New Event Request form.
 2. No item approved in a budget or previous New Event Request may be included in an additional New Event Request during the same fiscal year.
 3. Any organization that anticipates qualification for a higher level of competition (e.g. regional, district, national) may submit a New Event Request before actual qualification.
 - a. In such a case, the request will be reviewed according to standard procedure, but approved only on a conditional basis.
 4. An organization may request additional funding in their New Event Request.
 - a. This option is only available if a Supplemental Budget is not practical.
 - b. Any additional funding is contingent upon the organization's depletion of funds.
- C. Co-Sponsorships
 1. Co-Sponsorship requests allow for two or more clubs to work together in promoting an event.
 - a. To obtain financial assistance via the Co-Sponsorship Fund, submit an electronic Co-Sponsorship Request Form.
 2. The club bearing the majority of the expenses and responsibilities for the event shall be responsible for submitting the request, and shall be the club that receives the Co-Sponsorship funding.
 3. The request will be reviewed by the Allocations Committee and must meet the requirements and abide by any rules specified in official Senate documentation.
- D. Loans

1. Student Senate may confer loans in order to finance an event for which an organization lacks the upfront financial resources to host.
 - a. The Allocations Committee will be much more lenient in its appropriation of this type of funding since all funds will be repaid.
2. Loans may be applied towards events that Senate would otherwise be unable to fund.
 - a. An example of such an event would be a fundraiser.
3. Any money specified as a loan must be repaid by the end of the fiscal year, unless shorter terms are dictated by the Allocations Committee.
 - a. If shorter terms are agreed upon, the committee may impose a penalty schedule for late repayment which will be applied to future budgets and/or requests.
 - b. If repayment puts the club account in a deficit at the end of the fiscal year, the officers of the club will be held liable for fifty percent (50%) of the remaining debt.

V. Recommendation and Approval Process

- A. The Allocations Committee shall forward all budget and alternative funding recommendations, including those recommendations for zero (0) allocations, to the full Student Senate.
 1. The committee may recommend that Senate approve requests on a conditional basis.
- B. Requests, including any amendments made by Senate, may be approved by a majority vote; or, if a majority is not attained, may be returned to the Allocations Committee for further consideration.
- C. Approval shall be considered authority for transfer of funds.
 1. The Student Accounts Coordinator in the Student Activities Office shall be responsible for the authorized transfer of funds to the appropriate organizations.
 - a. The Student Accounts Coordinator is also responsible for:
 - (i) The monthly reconciliation of accounts for regular organizations
 - (ii) The disbursement and collection of funds for accounts
- D. Student Senate's funding decisions shall be made available to the public via the Senate website or other appropriate means of communication.
 1. No information may be publicized until it is presented to the full Senate by the Allocations Committee.

VI. Appeal Process

- A. An organization may appeal any decision made by Student Senate by filing a formal, written grievance with the Allocations Committee via e-mail.
- B. All appeals must be submitted within ten (10) working days following notification of Senate's decision.
- C. The organization will be given the opportunity to present their grievances to the Allocations Committee in the form of an oral report.
 1. This report shall be given by no more than three (3) members of the organization, fifty percent (50%) or more being officers.
 2. This report shall not exceed five (5) minutes in length and may be followed by a question and answer session.
 3. Deliberation regarding the committee's final action will be closed.

VII. Definition of Terms

- A. REQUESTED: the dollar amount an organization asks for in a budget
- B. ALLOWED: the dollar amount or event(s) deemed fundable in a budget request
 1. An event deemed 'fundable' is within the guidelines required for the expenditure of Student Life Series money.
 2. This does not ensure any dollar amount will be granted.
- C. FUNDED/ALLOCATED: the dollar amount actually provided
- D. GRANT: dollar amount given to an organization without the expectation of repayment or reimbursement
- E. LOAN: a dollar amount given to an organization with the expectation of reimbursement within that fiscal year
- F. SUPPLEMENTAL BUDGET: budget submitted during the course of the year to request additional funding for unanticipated expenses or events
- G. SPECIAL ORGANIZATION: any organization that has as its main objective the programming of events of an educational or entertaining nature which are designed to enrich the entire Lehigh Community and

whose accounts are chiefly administered by the faculty/staff advisor to the organization; the Office of Student Activities determines this status

- H. REGULAR ORGANIZATION: any organization recognized by the Student Senate, whose leadership consists of fifty-one percent (51%) undergraduate students and whose treasurer is an undergraduate student
- I. CONDITIONAL APPROVAL: approval of a request which is pending the fulfillment of some additional criterion or criteria (e.g. further detail, constitutional revisions, substantiating documents, qualification for the budgeted event, etc.)
- J. NEW EVENT REQUEST: a request by a club for approval and/or additional funding for an unanticipated expense or event that was not requested in their budget for that fiscal year
- K. STUDENT LIFE SERIES FUND: funds set aside by the University to be distributed to qualified clubs by the Senate Allocations Committee
- L. CO-SPONSORSHIP REQUEST: a request by a club for approval and/or additional funding for an unanticipated expense or event for which they will partner with one or more other clubs or organizations.
- M. CONTINGENCY FUND: a non-interest bearing savings account for Student Senate for use toward long term sustainability and progress. Governance of this account is outlined in the Student Senate Bylaws and the Treasurer's Contingency Fund Manual.
- N. POLICY LIST: a document that records the policies of the Allocations committee regarding funding decisions pertaining to budgets, new event requests, and co-sponsorship requests so as to encourage the consistency of funding decisions from one year to the next. Governance of this list is outlined in the Student Senate Bylaws and the Treasurer's Policy List Manual.

VIII. Approvable Items and Events

- A. Travel
 - 1. Personal car
 - a. Travel expenses shall be covered at a per-mile rate, not to exceed the current Federal rate.
 - 2. University car and van rental
 - 3. Bus
 - a. Must be the most economical means of transportation.
 - 4. Airfare
 - a. Air travel must be necessary.
 - b. Economy Class only.
 - c. Evaluated on a case by case basis.
 - d. Destination must be specified, otherwise request must be resubmitted in more detail.
 - 5. External vehicle rental
 - a. Applicable only in destination area when traveling via airplane.
 - 6. Tolls and parking expenses
- B. Lodging
 - 1. Hotel costs up to \$125 per room per night.
 - a. Each overnight stay must be unavoidable.
 - b. Minimum of four (4) people per room, if group size allows.
- C. Advertising
 - 1. Flyers, brochures and hand-outs.
 - 2. Advertisements in Lehigh publications, such as *The Brown & White*, *the Lehigh Patriot*, and *the Brown & Black*.
 - a. There is no limit to advertising in internal publications.
 - 3. Advertisements in external publications.
 - a. Maximum \$100 per event
 - b. Publication must be approved by the Allocations Committee prior to printing.
- D. Copying
 - 1. Use University Printing Services whenever possible.
 - 2. Maximum of \$25 per event, except in special circumstances.
- E. Food and Refreshments
 - 1. Includes paper goods, utensils, etc.
 - 2. For organizational meetings and BBQ's
 - a. Approvable for maximum one (1) meeting per semester or total of two (2) per year.

- b. Maximum \$100 per meeting.
 - 3. For student-faculty mixers
 - a. Refreshments approvable for maximum two (2) mixers per year.
 - b. Maximum of \$100 per mixer.
 - 4. For speakers/panel discussions and on-campus productions
 - a. Refreshments
 - (i) Maximum of \$100 per event.
 - b. Meals
 - (i) Maximum two (2) members plus the guest(s).
 - (ii) Maximum \$20 per person.
 - 5. For service-oriented and cultural events, including the International Bazaar
 - a. Maximum amount approvable left up to Allocations Committee discretion.
 - 6. Organizational BBQ's
 - a. Maximum amount allowable left up to the discretion of the Allocations Committee.
- F. Honorarium
 - 1. Maximum \$1,000 per speaker plus travel expenses.
 - a. The Allocations Committee will consider special circumstances.
 - 2. Panel Discussion
 - a. Maximum three (3) speakers can be funded per event.
 - 3. No Lehigh University staff, faculty member, student, or alumnus may be paid as a speaker.
- G. Mandatory Hires
 - 1. Coaches, referees, judges, security, DJ's, etc.
 - 2. Except for at purely social events
 - 3. Fully approvable at reasonable rates, including travel expenses.
- H. Fees and Charges
 - 1. Fixed costs such as set-up, registration, annual dues, etc., are fully approvable.
- I. Tickets
 - 1. 50% of ticket costs approvable up to a maximum of \$20 per ticket.
 - 2. Ticket costs for cultural events, such as museum visits, are fully approvable.
- J. Conferences
 - 1. If total cost is greater than \$100 per person, only two (2) members approved to go.
 - a. This provision applies to all costs, including registration and travel expenses.
 - b. Funding for additional participants is approvable at the discretion of the Allocations Committee.
 - 2. Maximum two (2) conferences per year.
 - a. Includes regionals, nationals, etc.
 - 3. Conferences hosted by organization at Lehigh
 - a. Organization must first meet with the Allocations Committee regarding details of the event.
 - (i) Amount approved left up to the discretion of the committee.
- K. Equipment, Uniforms and Costumes
 - 1. Fully approvable so long as they are necessary and inventoried with advisor and kept for future club use.
 - a. To accommodate this requirement, no individual personalization permitted.
 - b. Medical kits are only approvable if the Office of Intramural and Club Sports cannot provide them.
 - c. Clubs must provide own storage space for their equipment.
- L. Decorations
 - 1. All reusable items must be inventoried.
- M. Overhead
 - 1. Office supplies, telephone charges, website, audio/video film, nametags, etc., are fully approvable.
- N. Movies
 - 1. Must be acquired through Media Center or legitimate national organizations.
 - 2. Cannot violate copyright laws.
 - a. Prior to any public screening, organization must meet with Assistant Dean of Student Activities in order to ensure compliance.
 - 3. Maximum of \$500 per screening.
- O. Lehigh Ropes Course Leadership Training
- P. Events over Academic Breaks

1. Organizations must receive approval by the Student Senate Treasurer no later than two (2) weeks prior to the event.
 2. The officers must provide an itinerary to the Allocations Committee prior to the trip.
 3. Attendees shall be responsible for their own dining expenses.
 4. Unless otherwise stated, all applicable guidelines regarding necessary costs, such as entry fees, travel expenses and lodging, will apply.
 5. Approvable at the discretion of the Allocations Committee
 6. A clear description of the benefit to the Club or the greater Lehigh Community must be included in the event description.
- Q. Resume workshops and mock interviews held solely by student groups .
- a. Maximum amount allowable left up to discretion of the Allocations Committee.

IX. Non-Approvable Items and Events

- A. Any function that excludes any student from attending, such as Military Balls
1. Training, tournaments and conferences are excluded from this provision.
- B. Illegal activity
- C. Purchase or promotion of alcohol
- D. Any activity related to gambling
- E. Legal fees, such as bail, parking tickets, attorney/court expenses, etc.
- F. Any function that promotes any form of ‘hazing.’
- G. Promotion of religious institutions and/or activity
- H. Biased political events, including campaign fundraising and speakers tied to political campaigns
1. Events presenting political discourse from multiple perspectives may be approved.
- I. Social events, such as parties, non-faculty mixers, etc.
1. DJ’s for social events are not approvable.
 - a. See *Section VIII.G* for exceptions.
- J. Food and refreshments for strictly social functions
1. See *Section VIII.E* for exceptions.
- K. Meal or entertainment expenses incurred by the organization’s members while traveling on organization business
- L. Clothing, equipment or other personal items for general membership distribution that cannot be inventoried for future use
1. See *Section VIII.K* for exceptions.
- M. Personal property, including reading books, tapes, etc.
- N. Awards and/or prizes
- O. Career services, such as mock interviews, resume workshops, et held solely or in partnership with University Career Services.
- P. Fundraiser costs
1. Exceptions may occur at the discretion of the Allocations Committee.
 2. Organizations may use Senate loans to cover fundraiser costs.
 - a. See *Section IV.D* for details.

X. Violations and Penalties

- A. The Allocations Committee reserves the right to hold hearings for any organization that is believed to have violated these guidelines.
1. The committee has the authority to review individual accounts and obtain official ledgers in order to discover any violations.
- B. The Student Senate Treasurer and the Office of Student Activities shall both be empowered to freeze budgets for the following reasons:
1. Deficit balances
 2. Violating established policies and/or procedures of the University, Student Senate or the Office of Student Accounts
 3. Misuse of funds
 - a. This provision includes the failure to meet any conditions attached to a funding decision, as described in *Section VII.I*.

- C. The Allocations Committee may insist that an organization removes and replaces its treasurer if said treasurer continually violates financial policies or significantly hinders the financial operations of the organization.
- D. Any organization whose executive officers or members forge the name or records of member lists for an organization or activity shall forfeit privilege to use any Senate allocated funds.
- E. Should a hearing show that a violation did occur, the case will be referred to the Student Senate Judicial Board, which shall have final disciplinary authority.
 - 1. Consult relevant Senate documentation for information on the policies and procedures of the S.S.J.B.

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