

Temple Student Government

2019-2020 Allocations Guidelines

Contents

Introduction.....	2
Types of Requests.....	4
Restrictions	5
Applying for Allocations	8
Submission Timing.....	8
Filling out the Application.....	9
Allocations Process.....	13
Attendance	14
Allocations Storage.....	16



SERVE. UNITE. BUILD.

Introduction

1. Purpose: As stated in the Temple Student Government (TSG) Constitution, the purpose of the Allocations Program is to “allocate funding for student organizational programming to promote and enhance the educational, recreational, social, and cultural life of the student body.”
2. Funding: TSG Allocations are funded by the General Activities Fee (GAF). The GAF is part of every student’s annual university fee. Each year, the GAF Committee determines the amount of GAF money Allocations will receive for the upcoming school year. For the 2019-2020 fiscal year, TSG has been allocated \$150,000.
3. Eligibility: The Allocations program caters to undergraduate and graduate student organizations, fraternities, and sororities that are registered with Student Activities and in good standing.
 - a. Student organizations in good standing have completed all annual requirements including Annual Re-Registration and Student Org Basics. Additionally, fraternities and sororities in good standing have completed the Diamond Accreditation Chapter Standards of Recognition.
 - b. Student organizations are eligible for Allocations if they have met the attendance requirement each semester (see the section on Attendance).
 - c. Student organizations must have no outstanding items in their possession that belong in Allocations Storage (see the section on Allocations Storage).
4. Financial Responsibility: TSG does not have the financial resources to fully fund the activities of all organizations. Allocations serve as a **supplement** to an organization’s expenses. Allocations **ARE NOT** guaranteed to any organization and are subject to the approval of the Allocations Committee upon receipt of a **complete** Purchase Request in Owl Connect. Organizations remain financially responsible for their events, programs, or activities and must not rely solely on Allocations for funding. Organizations should always have a backup plan for funding their event in case their request (or portions of it)

is denied. The Allocations Committee evaluates each Purchase Request individually. Past approval for an annual event/program **does not guarantee approval** in the current year.

- a. TSG encourages organizations to come up with creative ways to stretch their Allocations further and to fund events that may cost more than the organization can allocate for. Some examples include:
 - i. Co-sponsor the event with a fellow organization and split the Allocations request between your organizations. This may allow you to access more funds than if you were to rely solely on one organization's request for allocations.
 - ii. Share resources purchased through Allocations with interested and relevant parties, as applicable by the discretion of the Allocations Committee.
5. TSG Allocations Committee: Allocations are disbursed on a weekly basis at the approval of the Allocations Committee. The three Directors of Allocations manage the Committee and handle all interaction with student organizations. Committee members assist in the review of Allocations requests.
 - a. Members of the Committee
 - i. Director of Allocations
 - ii. Deputy Director of Allocations
 - iii. Director of Allocations Communications
 - iv. 5-7 Allocations Committee members
 - v. Staff Member of Student Activities
 - b. The Committee conducts final request reviews every Friday from 4-5:30 pm.
 - c. Students in good standing per TSG requirements are welcome to apply to become an Allocations Committee member. Interviews for member positions are conducted during the first two weeks of the Fall semester. Please email tsgabc@temple.edu if interested.
 - d. The Allocations Committee reserves the right to have up to two complimentary tickets for any event funded through TSG Allocations.
6. Misuse of Allocations: Misuse of Allocations may result in the suspension of funding privileges, repayment of total money allocated, loss of organizational registration status,

or any other sanction seen fit by the Allocations Committee, TSG, Student Activities, and/or Student Conduct and Community Standards.

- a. Items funded by TSG Allocations are the property of Temple University. Personal use of the items before or after the event is strictly prohibited.
7. Additional Support: Other educational opportunities (workshops, inviting the Directors to e-board meetings, etc.) are available to all student organizations
- a. Student organizations are welcome to visit the TSG office and discuss Allocations matters with an Allocations representative during office hours. Please email tsgabc@temple.edu, visit the TSG website, or stop by the TSG office in the HGSC Room 244 if you would like to know when an Allocations member will be holding office hours.
 - b. Please refrain from asking Allocations related questions to other TSG members as they might provide you with inaccurate information. Ask them to refer you to one of the Directors.
 - c. If the Allocations office hours are not convenient for your schedule, you are welcome to schedule an appointment outside of those hours. Please email tsgabc@temple.edu if you would like to do so.

Types of Requests

1. Operating Budget Request: Once per academic year, organizations can request up to \$100 for the purchase of items necessary for the daily operation of their organization (i.e. folders, binders, office supplies, customized banner, et.) Amazon and Staples are the preferred vendors. Alternate vendors that provide items unique to the organization's mission may be approved upon review.
 - a. Requests should follow the Allocations restrictions in the subsequent pages and use the Supplies/Decorations sections and the Itemized Purchases tab on the Purchase Request Spreadsheet provided in Owl Connect.
 - b. Requests for Operating Budget will be taken throughout the year pending availability of Allocations funds. The Allocations Committee will track each organization's use of their operating budget to ensure only one request is made during the year.

2. Programming Budget Request: Organizations can request up to \$500 or \$2500 (depending on their STARS/Diamond Accreditation status) per semester to provide the campus with programming that contributes to the educational, cultural, and/or social needs of the student body. Programming includes:
 - a. Events: Must be consistent with the organization's mission statement and be open and advertised to the entire student body.
 - b. Honorarium (Guest Speakers, Performers, and Third-Party-Vendors): Must provide all necessary documentation which includes:
 - i. Invoice from the honorarium
 - ii. [Independent Contractor Determination and Certification](#)
 - iii. [Independent Contractor Request for Payment](#)
 - iv. [Professional Services Agreement](#)
 - v. [W-9 Form](#)
 - c. Conference/Competition Registration
 - d. Travel: Organizations can request up to \$250/semester to cover transportation expenses. Transportation method must have a clearly communicated departure and arrival location to comply with University payment procedures.
 - i. Organizations requesting funds for traveling outside the city limits of Philadelphia must follow the [Student Organization Travel Policy](#) by submitting a Student Organization Travel Form to Student Activities two weeks prior to departure.
 - ii. Acceptable modes of transportation include chartered bus, Amtrak, and Greyhound. See the next section for restricted modes of transportation

Restrictions

1. Alcohol: Funds are prohibited from being used to purchase alcohol.
 - a. Events are prohibited from including alcohol as an attraction.
 - b. For events that take place in locations where alcohol is served, no funds for the event can be used in the purchase of alcohol at the location.
 - c. The event should not take place at a location solely designed for the purpose of consuming alcohol.

- d. The organization is required to provide an itemized invoice or documentation verifying that alcohol is not included in the event
2. Food: Each organization has a limit to how much of their Allocations can be spend on food expenses. This amount is determined by each organization's STARS status.
 - a. 1 STAR: \$200/semester
 - b. 2 STAR: \$750/semester
 - c. 3 STAR: \$1000/semester
 - d. 4 STAR: \$1250/semester
 - i. Please note that Allocations considers items such as plates, napkins, cups, and cutlery as food expenses, so plan your expenses accordingly.
 - ii. Allocations will track all organizations food expenditure each semester and make it visible for all student organizations.
 - iii. Please see the website linked below for the Cherry and White catering policy. <https://studentactivities.temple.edu/policies-forms>
3. Fundraisers and Charitable Contributions: According to University policy, GAF funds must be used for activities that benefit Temple students directly. Allocations may not be used to raise funds for charitable contributions or other events.
 - a. Allocations may not be given away as philanthropic contributions. This includes both monetary donations as well as the purchase of items used for donation.
 - b. This also includes contributions to any candidate for public office or religious institution.
4. Gifts and Giveaways: Allocations fund may not be used to buy items to giveaway to members, students, etc. Items that are considered gifts/giveaways include, but are not limited to:
 - a. Diamond Dollars
 - b. Gift Cards/Prize money
 - c. Trophies/Plaques
5. Clothing: Allocations may not be used to purchase clothing items such as shirts, socks, shoes, and graduation attire.
6. Profitable Events: TSG Allocations cannot be used to help an organization make a profit.

- a. Organizations should consider ticket sales as income to cover the total event cost and adjust their requested amount accordingly.
 - b. For requests that indicate the organization will make a profit, the Allocations Committee will calculate the income based on ticket sales and estimated attendance and reduce the allocated funds so the event breaks even.
7. Luxury Items: Allocations will not be granted for any items or expenses the Committee deems inessential to the organization's basic mission statement and the events purpose.
 - a. Note that this restriction allows for a lot of interpretation by the Committee. If you feel an item that was considered "luxury" is essential for your event/mission, please discuss the matter with one of the Directors.
8. Membership Dues: Allocations will not be granted for dues for any organization, professional or otherwise.
9. Promotional/Advertising Items: Allocations will not be granted for any items that are used to promote the organization or its events.
 - a. This includes items such as t-shirts, pens, toys, etc.
 - b. Flyers, posters, and banners are an exception to this restriction. Please consult one of the Directors so that they can help you find cost effective methods for purchasing flyers/posters. Banners and table cloths are limited to one purchase per academic year as per our policy on Operating Budget requests.
10. Salaries and Stipends: TSG Allocations may not be used to compensate advisors, coaches, student officers, or members for their normal duties of operating the organization.
11. Scholarships: Allocations will not be granted for activities for academic credit.
12. Transportation: Discount bus companies (ex. Megabus and BOLT), SEPTA, taxi, Uber, Lyft, rental cars, personal vehicle gas or mileage, and air travel are all prohibited forms of travel.
13. Private Events: GAF funded events must be open to the entire student body.
14. Hotels/Lodging: Allocations for lodging at hotels or Airbnb are prohibited.
 - a. Some conferences may include a hotel in the conference registration package. If the cost of the hotel can be separated from the cost of the conference, Allocations

will only provide funds for the conference. If the two costs cannot be separated, Allocations will still be able to cover all the costs of the conference

15. Minors: If individuals under the age of 18 will be part of the event, you must complete and submit a minor on campus policy form.
 - a. This form must be completed 60 days prior to the event.
 - b. Please consult a member of Student Activities to ensure all paperwork required is in order.
16. Galas, Banquets, Formals: Due to issues surrounding the event being open to the entire student body, these events will not be eligible for funding.

Applying for Allocations

Submission Timing

- a. Purchase requests must be submitted at least 15 business days before the date of the event. For example, if the date of the event is on October 25th, 2019, the last day you can submit a request for that event is October 7th, 2019.
 - i. If the original request was submitted at least 15 business days prior to the event, all resubmissions can be submitted within those 15 business days before the event.
 1. Keep in mind that the closer you resubmit to the event date, the less likely it is that any items ordered will arrive in time for the event.
 2. The exception to this rule is honorariums. Due to the time required to process payment, requests for honoraria must be submitted at least 30 days prior to the event.
 - ii. Applications must be complete and accurate, with all necessary invoices and supporting documentation attached.
- b. Allocations pays expenses in advance to decrease the financial burden on organizations and its leaders. Reimbursements for any expense that has been paid prior to submission and approval of a Purchase Request will not be approved.

- i. Exception: Reimbursements may only be approved for events occurring prior to September 6th, 2019.

Filling out the Application

- a. To apply for Allocations, organization officer must submit a detailed Purchase Request within the Finance feature in Owl Connect
 - i. Only officers listed on the organization's Owl Connect roster have access to apply for Allocations.
 - ii. Log into Owl Connect and go to your organization's homepage
 - 1. In the upper right, click "Manage Organization"
 - 2. Click on the menu icon in the top left next to your organization's name to reveal the Organization Tools.
 - 3. Scroll down and click "Finance."
 - 4. Select "Create New Request," then select "Create Purchase Request."
 - a. DO NOT select "Create Funding Request." This is not a form that is used by Main Campus groups. If you select "Funding," the request will be canceled for resubmission.
- b. Request Details
 - i. Subject: The title of your event. (If an operating budget request, you can make the subject "[org name] operating budget.")
 - ii. Description: please provide a description of you event that includes what the event is, why you are holding it, why it is essential to your orgs mission, and any other details you feel may help the Committee better understand what the event is.
 - iii. Requested Amount: Amount of Allocations you wish to receive.
 - iv. Category: Select "TSG Allocations – (Main Campus Groups Only)."
 - v. Account: select your organizations account name.
- c. Payee Information
 - i. LEAVE BLANK
- d. Additional Information

- i. STARS/Diamond Status
 - ii. Date and Time of Event: please ensure that your events date falls outside the 15-business day rule (30 days for honoraria).
 - iii. Program Location
 - iv. If this request is a resubmission, please indicate that it is and the reason for the resubmission.
 - v. Annual program or new idea
 - vi. Event opening: Please indicate the total attendance for this event. This number will be used to calculate ticket sale revenue.
 - vii. Admission fee: Provide your admission fee here. Feel free to calculate your estimated sales revenue and put that figure here.
- e. Expenses and Payee Information
- i. The link to the “Main Campus Purchase Request Spreadsheet” is linked here which will serve as an outline for all your costs and help the Committee determine which expenses Allocations will be covering
 - 1. Open the document and download it as an Excel document. You can then save it to your computer and work on it in Excel instead of Google sheets.
 - 2. Do not change the formatting of any part of the document. Also, do not insert or delete any columns or rows.
 - ii. Program Expenses: This sheet outlines all the costs of the event, regardless of whether Allocations will be covering them or not.
 - 1. Delete the values in columns B & C as they are used as an example.
 - 2. Column A lists each type of expense. If you feel there is a type of expense that is not listed in the rows, please list that expense in the row for “Miscellaneous.”
 - 3. Column B is used to show the total cost of an expense for your event, regardless of whether Allocations is covering it or not while column C is used to show how much of that expense you would like covered by Allocations.

- b. For example, if your supplies cost for your event is \$500, but you would only like Allocations to cover \$300 of it, in cell B13 type “500” and in cell C13, type “300”.
 4. In cell B18, indicate the total cost of all your events expenses and in cell C18, indicate the total requested cost from Allocations
 - c. Ensure that everything adds up and that the amount in cell C18 is identical to the amount requested in Owl Connect.
 5. Do not fill out or delete any of the information in rows D & E.
- iii. Itemized Purchases: Any items you purchase will be indicated in this sheet.
 1. Rows 2 and 3 will be filled out upon opening the document. Please delete the information in these rows.
 2. For each item you are buying, please indicate the vendor, quantity, unit price, total price, item name, URL link, purpose of item, and additional information in their respective columns
 - d. By filling out the purpose of the item, it helps the Committee understand why you need that item. Keep the purpose short.
 3. Ensure that all math is correct and that the total price of all the items is the amount indicated on the previous sheet.
 - e. The easiest way to make sure all math is correct is to use Excel’s multiplication function. For example, to find the total price for the item in row 2, in cell D2 type “=B2*C2”
- iv. For Collaborative Events Only: this sheet only needs to be completed if you are hosting a collaborative event with another organization.
 1. This sheet is self-explanatory.
 2. If you are having a collaborative event, please email tsgabc@temple.edu so we can make sure that all your paperwork will be in order.

- v. Once you have the document completed, save it to your computer and upload it in the respective upload file box. Please upload as an Excel document. DO NOT upload as a PDF.
- f. Supporting Document Uploads
- i. If your expenses require you to upload supporting documentation, this is where they will be uploaded.
 - ii. Honorarium
 - 1. Please upload all 5 documents in their respective sections.
 - 2. Upload them all as a PDFs.
 - 3. If you have more than one honorarium, you can upload the 5 supporting documents for each one in the “Extra Space for Supporting Documentation” section.
 - iii. Room rental
 - 1. If you are renting a room at Temple (ex. A room in the HGSC), you can upload the planning meeting form in this spot.
 - 2. If you are renting a room that is at a location outside of Temple, you can upload the invoice for it here.
 - iv. Food
 - 1. If you are ordering from a vendor other than Cherry and White (Aramark), you can upload your Catering Exception Request form here
 - 2. [Catering Exception form](#)
- g. Additional fields
- i. If you have additional questions or concerns, you can place them in the respective box. It is also recommended that you either email tsgabc@temple.edu or visit us during our office hours so we can better understand your concerns and work out a solution before the end of the week.
 - ii. Allocations may have a question we would like answered by you during our meeting. If you place your phone number in the box, you may receive a call on a Friday between 4 and 5 pm.

Allocations Process

- a. Throughout each week, the Deputy Director will conduct preliminary reviews for all the requests that have been submitted.
 - i. These reviews will only check if all documentation for expenses is accounted for. If a request is missing any documentation, it will be denied for resubmission.
 - ii. If your request is denied, you will receive a notification from Owl Connect with an explanation in the comments as to why the request was denied.
 - iii. If your request is moved to the next stage, it will remain “Unapproved.” Please note that “Unapproved” **does not** mean “Denied.”
- b. Every Friday at 4pm, the Allocations Committee will conduct the final review for all requests that have passed preliminary review. Here, requests will either be approved, denied for resubmission, or denied.
 - i. If denied, you will receive a notification on Owl Connect, an explanation in the comments section as to why it was denied and, if needed, what needs to be done upon resubmission.
 - ii. If approved, you will receive a notification on Owl Connect for the amount you were approved for and the next steps.
- c. If your request is denied, it usually means the request cannot be funded according to these guidelines.
 - i. You have the right to appeal and re-apply for Allocations. Please email tsgabc@temple.edu or visit us during our office hours to discuss.
- d. After approval, a representative from your organization has 4 business days to visit Ms. Chris in the Student Activities Office (HGSC Room 219M).
 - i. Once there, Ms. Chris will walk you through how to get all your vendors paid.
 - ii. If someone from your organization does not come in during those 4 business days, your request will be canceled, the amount approved will be placed back into your account, and you will not be able to get those items paid.

- iii. If there is a special circumstance that prevents your organization from meeting that deadline, please let us know before hand so we can work out a solution.
- iv. Any budget modifications must be made prior to visiting Ms. Chris. If you would like to modify the request, please email tsgabc@temple.edu so that we can cancel the previously approved request so that you can submit another.
 - 3. If you modify your request, you will have to wait until the closest Friday to be approved.
- v. For any event cancellation you must separately notify the Allocations Committee, Student Activities, Student Center Operations, and any external vendors within 10 business days of the event to avoid any unnecessary charges.

Attendance

1. Purpose: To keep student organizations informed about the Temple Community and the Student Government that represents them, we require that student organizations have a level of interaction with TSG. This interaction will be satisfied by attending General Assembly meetings as well as reading TSG Newsletters.
2. Attendance: To be eligible for Allocations, an organization must keep up their attendance by attending GA's and filling out the attendance link from the TSG Newsletter.
 - a. An organization can miss 2 attendances in a semester and still maintain eligibility for Allocations.
 - b. Upon the 3rd missed attendance an organization's eligibility will be placed on hold pending the completion of a make-up form.
 - i. If your organization would like to complete this form, please email tsgabc@temple.edu. We will send you a copy that you can complete and email back.
 - c. Once your organization misses 4 attendances in a semester, your organization is officially ineligible for Allocations for the rest of the semester.

- d. Each new semester resets all organizations attendance, so if an organization was ineligible in the previous semester, they will be eligible in the current semester until they reach the same threshold of missed attendances.
 - e. Each organization is responsible for ensuring that one of their representatives is completing the attendances. Allocations will not make exceptions for organizations who have missed attendances based on not knowing the rules, leadership turnover, or failing to inform us of technical issues after the 4th absence.
 - f. Attendance for each week closes at 4 pm every Friday. At that time, the attendance link will close, and a member of the Allocations Committee will go through all responses to see which orgs completed attendance.
 - g. There is a google document available for all to view that can update you on the status of your attendance.
 - h. If there are questions or concerns regarding your organizations ability to maintain their attendance, please email tsgabc@temple.edu so we can find a way to accommodate you.
3. Types of Attendance: To receive attendance, a representative from your organization will be required to fill out an attendance link provided by TSG. These links can be found at an in-person General Assembly meeting, Town Hall, or in the TSG Newsletter.
- a. In-person General Assembly
 - i. TSG will hold one in-person GA at the beginning of each semester. They occur Monday's at 4 pm in the HGSC Room 200C.
 - ii. Only 1 member of your organization is required to attend the meeting. Upon completion of the meeting, a link will be provided for you to mark your organization down for attendance.
 - b. TSG Newsletter
 - i. During the weeks where there is no in-person GA, the TSG Newsletter will be sent out each Monday morning to all an organization's members listed on Owl Connect.
 - ii. To complete your attendance, you must read the newsletter and then answer a few questions about the newsletter's content.

- iii. It is every organizations responsibility to make sure that all necessary parties are receiving the newsletter. Please discuss with us immediately if you are not receiving the newsletter or would like to add someone to the list. We will deny all Allocations requests for organizations who make it known to us after submitting a request that they are not receiving the newsletter.
- c. TSG Town Hall
 - i. Twice a month, TSG will hold Town Hall meetings. Each organization is required to attend at least 1 of these meetings each month.
 - ii. Although attendance at Town Hall's is a part of the attendance requirement, it is separate from the TSG Newsletter. The TSG Newsletter MUST be filled out each week.
 - iii. If there are concerns surrounding your organization's ability to attend the Town Hall's please email tsgabc@temple.edu.

Allocations Storage

1. Purpose: To be more resourceful, reduce costs, and allow more funding to be used, Allocations will be collecting and storing various items that we feel can be re-used. Items purchased by Allocations are the property of Temple University and if they can be re-used, they must be returned to Student Activities, not taken for personal use.
2. System
 - a. This program will take into effect at the start of the Fall semester of 2019 with zero items in the unit.
 - b. As requests come in through the year, Allocations will determine what items from the request need to be returned. Also, if a request includes an item that Allocations already owns, we will not fund that item and instead refer them to borrow the item from the closet.

- c. If there are items that are requested to be returned, those items will be listed in Owl Connect and you will also receive an email from Allocations with instructions on what steps need to be taken.
- d. You will be required to sign a document acknowledging that the items purchased are the property of Temple University, they must be returned in fair condition, and that they must be returned within 5 business days after the event.
 - i. If this document is not returned before payment processing, and the 5-business day deadline has passed, your request will be canceled.
- e. After the event is complete, you will take the items to be returned to the Temple Student Government office (HGSC Room 244) and notify the front desk worker. Each day a member of Allocations will take these items and store them.
 - i. If you do not return the items within 5 business days, your Allocations eligibility will be hold until the items are returned. This eligibility restriction carries over each semester.