

Temple Student Government

Allocations Guidelines

2018-2019

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I. Introduction

- A. 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.”
- B. 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 TSG will receive for the upcoming school year. For the 2018-2019 fiscal year, TSG has been allocated \$144,500.
- C. Eligibility: The Allocations program caters to undergraduate and graduate student organizations, fraternities, and sororities that are registered with Student Activities and in good standing.
1. Student organizations in good standing have completed all annual requirements **including Annual Re-registration and Student Org Basics**. Fraternities and sororities in good standing have completed the **Diamond Accreditation Chapter Standards of Recognition**.
- D. 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 back-up plan for funding their event in case their request (or portions of it) is denied.

1. 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:
 - a) Co-sponsor the event with a fellow organization and split the cost of allocations between your organizations. This allows you to allocate for more of the cost you may be able to do normally
 - b) Share resources purchased through Allocations with interested and relevant parties, as applicable by the discretion of the Allocations Committee
- E. TSG Allocations Committee: Allocations are disbursed on a weekly basis at the approval of the Allocations Committee.
 1. The committee meets on Fridays from 3:00-5:00 PM in HGSC 219M.
 2. The committee evaluates each Purchase Request individually. Past approval for an annual event/program does not guarantee approval in the current year.
 3. Anyone is welcome to sit on the Allocations Committee. Email tsgabc@temple.edu if you are interested in joining.
 4. The Allocations Committee reserves the right to have up to two free tickets for any event funded through TSG Allocations.
- F. Misuse of Allocations: Misuse of Allocations could result in the suspension of funding privileges, repayment of total money allocated to the organization, loss of organizational registration status, or any other sanction seen fit by the Allocations Committee, Temple Student Government, Student Activities, and/or Student Conduct and Community Standards.
- G. Additional Support: Other educational opportunities (workshops, inviting the chairs to e-board meetings, etc.)

II. Types of Requests

- A. 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, etc.). Amazon and Staples are the preferred vendors. Alternate vendors that provide items unique to the organization's mission may be approved upon review.
1. Requests should follow the restrictions below in Section III and use the Supplies/Decorations section and Itemized Purchases tab on the Purchase Request Spreadsheet provided in Owl Connect.
 2. There is no deadline for these requests. The Allocations Committee will track each organization's use of their operating budget to ensure only one request is made during the year.
- B. 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:
1. Events: Must be consistent with the organization's mission statement and be open and advertised to entire student body
 2. Guest Speakers, Performers, and Third-Party Vendors: Must provide all necessary documentation which includes
 - a) [Independent Contractor Determination and Certification](#)
 - b) [Independent Contractor Request for Payment](#)
 - c) [Professional Services Agreement](#)
 - d) [W-9 Form](#)
 3. Conference/Competition Attendance
 4. Travel: Organization can request up to \$250/semester to subsidize transportation expenses. Transportation method must have a clearly communicated departure and arrival location to comply with University payment procedures.
 - a) 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.
 - b) Acceptable modes of transportation include: chartered bus, Amtrak, and Greyhound tickets. See Section III for restricted modes of transportation.

- III. Restrictions: Since TSG Allocations is funded by student fees (GAF), there are restrictions on how the money can be spent.
- A. Alcohol: Funds are prohibited from being used to purchase alcohol. Events are prohibited from including alcohol as an attraction. For events that take place in locations where alcohol is served, no funding for the event can be used in the purchase of alcohol at the location. The event should not take place at a location solely for the purpose that the location serves alcohol. The organization is required to provide an itemized invoice or documentation verifying that alcohol is not included in the event.
 - B. Catering: Food expenses may not exceed 50% of the requested amount.
 - 1. If the request violates this restriction, the Committee will reduce the amount that is allocated for food so that it meets 50%
 - C. Fundraisers, Charitable Contributions, Gifts or Giveaways: 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. Allocations may not be given away as philanthropic contributions. This includes contributions to any candidate for public office or religious institution.
 - D. Profitable events: TSG Allocations cannot be used to help an organization make a profit.
 - 1. Organizations should consider ticket sales as income to cover the total event cost and adjust their requested amount accordingly
 - 2. For requests that indicate the organization will make a profit from the event, the Allocations Committee will calculate the income based on ticket sales and estimated attendance and reduce the allocated funds so the event breaks even.
 - E. Luxury items: Allocations will not be granted for any items or expenses the committee deems inessential to the organization's basic mission statement and purpose.
 - F. Membership dues: Allocations will not be granted for dues for any organization, professional or otherwise
 - G. Promotional Items: Allocations will not be granted for any items that are used to promote the organization or its events such as t-shirts, pens, toys, etc.
 - 1. Flyers and posters are an exception to this restriction.
 - H. Salaries and Stipends: TSG Allocations may not be used to compensate advisors, coaches, student officers, or member for their normal duties of operating the organization.
 - I. Scholarships: Allocations will not be granted for activities for academic credit.
 - J. Transportation: Discount bus companies (such as Megabus and BOLT), SEPTA, taxi, Uber, Lyft, rental cars, personal vehicle gas or mileage, and air travel are all prohibited forms of travel
 - K. Private events: GAF-funded events must be open to the entire student body.

IV. Application Process

A. **Purchase Requests must be submitted 15 business days before the date of the event.**

The applications must be complete and accurate, with all necessary invoices and supporting documentation attached.

1. On Mondays, committee members will review the Purchase Requests for completeness and alignment with these guidelines. If the Purchase Request is missing required documentation or information, it will be denied and resubmission will be due Friday mornings.
2. On Friday afternoons, the Allocations Committee will make final vote on disbursement of funds.
3. Payment processing will begin with Miss Chris in Student Center 219M on Mondays.

B. To apply for Allocations, organization officers must submit detailed Purchase Requests within the Finance feature in [Owl Connect](#).

1. Only officers listed on the organization's Owl Connect roster have access to apply for Allocations.
2. Log into Owl Connect and go to your student organization's page. In the upper right, click Manage Organization. Click the menu icon in the top left next to your org's name to reveal the Organization Tools. Scroll down and click Finance. Then, choose "Create Purchase Request" in the top right.
 - a) Main Campus organizations will NEVER use "Create Funding Request." Incorrect submissions will be cancelled without review by the Allocations Committee.
3. Answer all Purchase Request questions with as much detail as possible, including event details such as time, date, location, d, attendees, etc.
 - a) Verify that "TSG Allocations – (Main Campus Groups Only)" is selected in the category section. If a different category is selected, the committee may overlook your request.
 - b) In this section, provide a description of event purpose and outcomes, STARS/Diamond Status, date, time and location of the event, projected attendance, admission fee, etc.
 - c) Verify your requested amount is identical to the requested amount indicated on your Purchase Request Spreadsheet.
4. Fill out the [Main Campus Purchase Request Spreadsheet](#) under the "Expenses and Payee Information" section. This spreadsheet outlines all the costs for the event, including expenses not covered by Allocations.

- a) This document is set to "View Only" to maintain the template's format. Click File>"Download as" to save your own copy for edits and TSG Allocations submission.
 - b) For each row, indicate the total cost of that expense type and the requested cost from Allocations in their respective columns.
 - c) DO NOT create additional rows if your expense type is not listed. Please indicate these amounts in the "Miscellaneous" row.
 - d) On the Itemized Purchases tab, if applicable, include the vendor, quantity, unit price, total price, and a URL to the item you are buying in their respective columns. Verify that the Total Price matches Quantity times Unit Price.
 - (1) The easiest way to do this is to use Excel's multiplication function. For example, to find the total cost for an item in row 2, type "=B2*C2" in cell D2.
 - e) The "Additional Information & Instructions" section describes required supporting information or documentation needed for upload
 - f) For Collaborative Events Only Sheet: For organizations who are hosting an event with another organization, use this tab to break down the sharing of costs.
 - g) At the bottom of the sheet next to "TSG Allocations' Contribution," indicate the total amount you are requesting from Allocations. If your organization is using other income to cover the total cost of the event, indicate that amount in the respective column. Double check to make sure this amount is identical to the amount provided on the Request Details.
 - h) Please upload to your completed Purchase Request Spreadsheet to your Purchase Request as an Excel file, not a PDF.
5. Upload all supporting documentation for your expenses. Examples include (but are not limited to):
- a) Invoices for items eligible for allocation
 - b) Registration Forms for Conferences
 - c) Student Center Operations invoices: As per Student Center Operations' policy, organizations hosting a complex event on campus must hold a planning meeting with Student Center Operations staff at least 20 business days prior to your event. At that meeting, you will receive an invoice from Student Center Operations that you can upload to your Purchase Request.

- (1) Complex events include any reservation requiring food, linens, amplified sound, or other technical services, any setup outside of basic chair setup or ANY outdoor event.
 - d) GMC requisition forms
 - e) W-9, Independent Contractor, and Professional Service Agreement forms for any external vendors. *If there are concerns, please reassure vendors that need to receive payment that their social security numbers are being processed via Owl Connect's secure servers.*
- C. Reimbursements: TSG Allocations pays expenses in advance in an effort to decrease the financial burden on organizations and its leaders. Reimbursements for any expense that has been paid prior to submission of the Purchase Request will not be approved.
1. Exception: Reimbursements are only approved for events occurring prior to the first TSG Allocations Committee meeting of the semester
- D. Approvals: After Purchase Request has been approved, you must notify Aramark, Student Center Operations, and any other university business of your organization's approval and payment method. You can easily print your Purchase Request from Owl Connect for proof of approval.
1. After approval, your organization has 4 business days to complete the request by visiting Miss Chris in Student Center 219M. Unclaimed approved Purchase Requests will be canceled after 4 business days and your Allocations balance will reset.
- E. Denials: If an application is denied it is usually because the requests cannot be funded according to these guidelines or the Purchase Request is incomplete. You have the right to appeal and re-apply for Allocations.
1. It is highly recommended that if your application is denied, you meet with the Allocations chairs to discuss options or revisions.
- F. Budget Modifications : Any budget modification must be submitted to tsgabc@temple.edu within 3 business days of the approved application. Organizations may not request more funds but may redirect approved funds to other expenses among the various categories listed on the original Purchase Request.
- G. Event Modification or Cancellation: for any event modification or 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.