## 2016-2017 GSA Officer Training



#### Welcome!

➤ Your 2016 – 2017 GSA Executive Board:

President: Tanja Aho (gsa-president@buffalo.edu)

Vice President: Amy Miu (gsa-vicepresident@buffalo.edu)

Treasurer: Anastasia Stepanova (gsa-treasurer@buffalo.edu)







#### **GSA Staff**

#### > Student staff

- Editorial Staff: Allison Siehnel & Daniel Gomes (gsa-editorial@buffalo.edu)
- Webmaster: Holly Keily (gsa-webmaster@buffalo.edu)
- Programming: Diana Moore & Tina Raad (gsa-programming@buffalo.edu)
- MDRF: Jennifer Schechter & Brittany Kenyon (gsa-mdrf@buffalo.edu)

#### Office Managers

- Gena Zimmerman (gmz@buffalo.edu)
- Stephanie George (slfrank@buffalo.edu)

#### Welcome New Club Officers!

#### Please ask questions throughout!

- Office of Student Life
- EDI- Sexual Harassment Training
- GSA Budgetary Guidelines
- Managing Your Club's Budget
- Ticket Office Policies
- Other Important Information

### Office of Student Life

- > Luke Haumesser
  - Student Government Liaison
  - University Recognition Deadline: October 15<sup>th</sup>
  - UBLinked and Room Reservations
  - Alcohol Permits

## EDI- Sexual Harassment Training

- > Jessica Coram, Office of Equity, Diversity and Inclusion
- > Aaron Maracle, Wellness Education Services

# Budgetary Guideline Highlights: Crucial Points

- Funds **must** always be encumbered (requested and approved) **before** they are spent
- ➤ Deadlines for each semester's paperwork can be found in the **Budgetary Guidelines and Regulations**
- You must contact the GSA before the deadline(s) with any problems

# Budgetary Guideline Highlights: Crucial Points

- ➤ No GSA money, or funds generated using GSA money can be held in accounts outside of GSA.
- ➤ All money collected must utilize the Sub Board I Ticket Office
  - More information later

# Budgetary Guideline Highlights: Crucial Points

- Encumbrances for 2016-2017 must be submitted on or before June 1st and the money spent by July 31st
  - Minutes approving all expenses must also be provided by that deadline
- Clubs may not build up or roll over GSA funds to next year's budget
  - except for independently fundraised money

Guidelines For All Clubs

- > All events **must** be held in a public place
  - On-campus space reservations can be made via UBLinked
- Any on-campus event where alcohol will be served require prior approval from the Alcohol Review Board
  - Complete application at least two weeks in advance
    - http://www.student-affairs.buffalo.edu/studentlife/alcohol.php
- All events must be advertised
  - Include a copy of the advertisement with the final paperwork

Guidelines For Clubs All Clubs

- Senate Attendance
  - If club representative(s) miss two consecutive Senate meetings then the club budget will be frozen until the representative(s) attend a subsequent Senate meeting
  - Club officers will receive an email reminder after Senator(s) miss one meeting
- Please note that all elected Senate seats must be filled at each meeting in order for your club's attendance to be counted in full in order to maintain quorum at meetings.
  - i.e., If your club is eligible for 3 Senate seats and your club elects 3 Senators, then all 3 seats must be filled at each meeting by voting member (Senators, Alternates, and/or Officers). If only 2 voting members are present, your club will be considered absent.

Guidelines For Departmental Clubs

- ➤ Sponsoring Individual Club Members
  - No more than \$200 to any individual member per year
  - Conferences, Conventions, and Workshops
    - up to \$200 for presenters
    - up to \$100 for attendees
    - same documentation procedures as GSA conference funding
  - Student Research
    - up to \$200 per year

Guidelines For Departmental Clubs

#### Capital Equipment

- Items costing \$500 or more with a useful life of longer than 1 year are capital equipment
  - Purchases must be pre-approved by the GSA
  - Items must be available to all graduate students in the department
  - GSA owns the equipment and the club is the depository
  - Items location and condition must be accounted for annually as part of the Capital Equipment Survey

Guidelines For Special Interest and International Clubs

- All activities must be advertised to the Graduate Student Body
  - Events must be advertised in English
  - o If ads are multilingual, English must be included

# Budgetary Guideline Highlights: Other Funding Opportunities

- > Special Activity up to \$1,200 once per semester
  - Activities that benefit a large number of grad students, not just a single department or club
- Symposia up to \$1,400 once per year
  - Formal meetings that give grad students an opportunity to present their work
- > Scholarly Publication up to \$1,500 per publication
  - Journals or other academic publications edited and run by grad students
- Community Outreach earn up to \$250 per year
  - Clubs must perform a minimum of 40 hours of community service to an organization outside of UB

Other Funding Opportunities

- ➤ Interdepartmental Activity
  - Activities organized by and for 2 or more departmental clubs
  - GSA may match the amount contributed by the club contributing the least funding (m), multiplied by the number of participating departmental clubs (n)
    - n × m
  - Up to \$500 for 2 clubs; additional \$50 for each additional departmental club up to \$750 (total for 7 or more departmental clubs)
    - i.e., 3 clubs = \$550 max, 4 clubs = \$600 max, etc.

#### Individual Funding Opportunities

- Conference Funding
  - Up to \$550 for PhD students over their graduate career
  - Up to \$350 for Masters students over their graduate career
  - Up to \$200 per conference if attending and not presenting
- Mark Diamond Research Fund
  - Up to \$1,500 for Masters thesis
  - Up to \$2,000 for MFA final project
  - Up to \$2,500 for PhD dissertation

# Budgetary Guideline Highlights: Exclusions

- No honoraria for UB faculty/staff
- Mileage = \$0.54 per mile (or standard mileage rate at the time of travel)
- No secretarial expenses
- No political and religious activities
  - Does not apply to activities designed to provide information or scholarly debate

# Budgetary Guideline Highlights: Exclusions

#### > Sales Tax

- Get Tax Exempt Form from Sub-Board I (SBI) before making any purchases
  - You will need to provide them with your PO#
  - Misuse of this form is against the law
- Gifts and Contributions
  - Up to \$50 per semester may be spent on gifts/awards;
    maximum of \$100 per year
  - No donations or charitable contributions can be made with GSA funds

# Budgetary Guideline Highlights: Exclusions

- Individual reimbursement for expenses incidental to holding a club activity
  - i.e., Gas money for picking up party supplies, phone charges for planning an event
- Gratuities are limited to 20% maximum
  - Any amount above will not be paid or reimbursed
- > \$30 per capita maximum for UB student and faculty meals

## **Special Notes**

- All reimbursements require original, vendor specific, itemized receipts <u>and</u> proof of payment
- > All events must be held in public locations
  - No GSA-funded club events may be held at a private residence
- All on-campus events where alcohol will be served must receive prior approval from the Alcohol Review Board
- Please review all of the guidelines for more details.

#### Step 1: Find out about your account

- Know your account balance
  - Call 645-2960
  - Email the Office Managers
  - Stop into the North Campus office Monday Friday
    - 310 Student Union
  - South Campus Satellite office on Tuesdays
    - 302 Abbott Hall (Health Sciences Library)

#### Step 2: Fill out an Encumbrance Request Form

- Include vendor name and address (person or company you are paying)
- Must be signed/requested by a club officer
- Details about what you are requesting
- When and where the event will take place
- Whether or not alcohol will be served

#### Step 3: Wait for Encumbrance Approval

 Club Treasurers and Presidents will receive the email notification from GSA

## Step 4: Is there any additional paperwork necessary?

- Tax Forms (needed for new vendors)
- General Services Contract
- Speaker Contract
- Co-sponsorship Agreement (giving money)
- Sponsorship Agreement (getting money)
  - Transferring money between GSA clubs just requires an encumbrance and club minutes

\*GSA will let you know if any of these will be required

#### Step 5: What to do once you are authorized

- Get a Tax Exempt form from Sub Board 1
  - 341 Student Union
  - You will need to know your PO#
  - You will not be reimbursed for any tax paid or for any bottle deposits
- Make your purchase and save all of your receipts

\*Please ask questions before you make a purchase if you are unsure about anything

# Paperwork required for reimbursement

- Original, itemized receipt(s), invoice or contract
  - No photocopies, scans, faxes or generic, non-vendor specific receipts are acceptable
  - The credit card slip that you sign is **not** an itemized receipt.
    You must submit the itemized cash register receipt **and** the credit card slip.
  - It is your responsibility to request an itemized receipt if one is not provided to you by the vendor.
- Proof of payment
  - Copy of the credit card statement showing your name and listing the payment, or a copy of the actual credit card (if the account numbers show up on the receipt)
  - A copy of the front and back of the cancelled check
  - Cash payments must be indicated on the receipt

# Paperwork required for reimbursement

- Club minutes showing the vote to approve the expense(s)
  - Minutes must list amount approved and name of vendor
  - Email votes are not accepted unless there are special circumstances, and only with prior approval from the GSA
  - Please note that all approvals of expenses must be voted on at an open club meeting. Officers alone cannot approve expenses!
- Advertisement for the event
  - i.e., flyer or listserv email
- Receiving Report
  - Verifies that good(s) or service(s) were received in full and authorizes the processing of the payment
- All paperwork should be submitted within 2 weeks of the expenditure

## **Special Notes**

- The GSA can pay some vendors directly
  - Wegman's cards can be signed out at either GSA office
  - Franco's, Zetti's, Santora's or Besta Pizza
  - Eaton Office Supply or Staples
    - we place the order
  - University Bookstore
  - The UPS Store in the Commons
  - Three Pillars Catering or any Campus Dining and Shops (CDS) organization
  - Any vendor that is willing to accept a Purchase Order (PO) and invoice for goods or services
- Be clear to the vendor that the bill must list the club name, and must be mailed to GSA directly, not to the department
  - 310 Student Union, Buffalo, NY 14260

- ➤ Ticket Office Policies/ How to make deposits
  - Any time you collect money for anything at all, you must use the Sub Board I Ticket Office
  - Contact <u>sbi-to@buffalo.edu</u> at least ten business days before you plan to sell tickets/goods or collect any money
  - It is always better to ask first rather than make a mistake and be penalized.

## Club Website Policy

- > All club websites **must** be hosted on the GSA server
- Any club whose website is found in violation of this policy will have its budget frozen
- Please contact the GSA Webmaster if you need assistance
  - gsa-webmaster@buffalo.edu

#### New Student Orientation

- ➤ Each Departmental GSA club must hold a new student orientation for all of their members
- > This meeting should cover GSA services such as:
  - Programming and Events
  - Conference Funding
  - MDRF
  - Free Editorial Services

## Other Important Info

- No clubs are allowed to contract with outside organizations. All contracts must be signed by a GSA E-board member, not the club officers.
- ➤ Please note that Club Officers are responsible for forwarding GSA emails to their department/club listservs, as we have limited access to the master graduate student listserv.
- ➤ If you are interested in serving on a GSA committee (Election Committee, SBI Board of Directors, etc.) please contact the GSA office for more information.

#### More info

- Constitutions must be updated and approved. Once approved, please make sure they are uploaded to your club's UBLinked page.
- ➤ All updated activation paperwork (Officer election, Senate election, New Student Orientation sign-in and Constitutions) are due by **September 30**<sup>th</sup> or your club's funds will be frozen!

## Questions?

