

# 2017-2018 GSA Officer Training

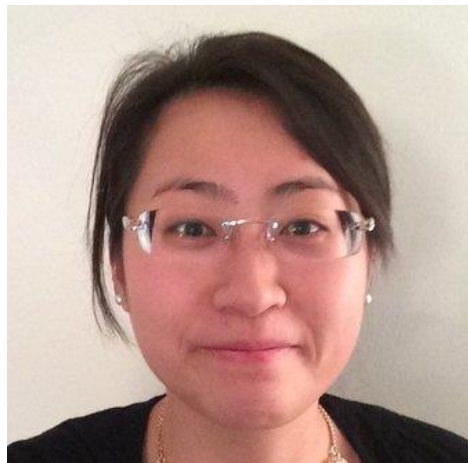


GRADUATE STUDENT ASSOCIATION

# Welcome!

## ➤ Your 2017 – 2018 GSA Executive Board:

- President: Tanja Aho ([gsa-president@buffalo.edu](mailto:gsa-president@buffalo.edu))
- Vice President: Amy Miu ([gsa-vicepresident@buffalo.edu](mailto:gsa-vicepresident@buffalo.edu))
- Treasurer: Anastasia Stepanova ([gsa-treasurer@buffalo.edu](mailto:gsa-treasurer@buffalo.edu))



# GSA Staff

## ➤ Student staff

- Editorial Staff: Veronica Wong, Jeremy Lakoff, Adam Drury, and Samantha Schichtel-Greenwood (gsa-editorial@buffalo.edu)
- Webmaster: Sumedh Ambokar (gsa-webmaster@buffalo.edu)
- Programming: Courtney Doxbeck (gsa-programming@buffalo.edu)
- MDRF: Jennifer Schechter and 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 Campus Life
- EDI- Sexual Harassment Training
- GSA Budgetary Guidelines
- Managing Your Club's Budget
- Ticket Office Policies
- Other Important Information

# Office of Campus Life

## ➤ Luke Haumesser

- Student Government Liaison
- University Recognition Deadline: October 12<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
- You must contact the GSA **before** the deadline(s) with any problems
- Deadlines for each semester's paperwork can be found in the ***Budgetary Guidelines and Regulations***

# 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 2017-2018 must be submitted on or before June 1st and the money spent by July 15th
  - 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

# Budgetary Guideline Highlights:

## *Guidelines For All Clubs*

- Meetings must be advertised and open to all club members
- Minutes:
  - Must list everybody present
  - Must show the vote (unanimous or detailed)
  - Expenditures cannot be approved by club officers only

# Budgetary Guideline Highlights:

## *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

# Budgetary Guideline Highlights:

## *Guidelines For 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.

# Budgetary Guideline Highlights:

## *Guidelines For All Clubs*

### ➤ Common Expenditures

- Invited Speakers
- Films, videos, or other media rental
- Office supplies
- Printing and publication
  - Up to 20% of budget for publishing scholarly work
  - Club newsletter
- Social events

# Budgetary Guideline Highlights:

## *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

# Budgetary Guideline Highlights:

## *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 Finance Committee
  - 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

# Budgetary Guideline Highlights:

## Guidelines For **Special Interest** and **International Clubs**

- All activities must be advertised to the Graduate Student Body
  - Events must be advertised in English
  - 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

# Budgetary Guideline Highlights:

## *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)
  - $n \times m$
- 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.

# Budgetary Guideline Highlights:

## *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 \$3,000 for PhD dissertation
- Lifetime maximum of \$4,500

# Budgetary Guideline Highlights:

## *Exclusions and limitations*

- No honoraria for UB faculty/staff
- Mileage = \$0.535 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 and limitations*

### ➤ Sales Tax

### ➤ Gifts and Contributions

- Maximum of \$100 per year may be spent on gifts/awards;
- No donations or charitable contributions can be made with GSA funds

# Budgetary Guideline Highlights:

## *Exclusions and limitations*

- 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
- No club funds may be used to pay for the purchase or reimbursement of the cost of tickets for events organized by the GSA.

# Managing Your Club's Budget

## 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)

# Managing Your Club's Budget

## 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



# Managing Your Club's Budget

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)

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

# Managing Your Club's Budget

Step 5: What to do once you are authorized

Direct billing

Reimbursement

Wegmans,  
Zetti's etc.

Vendors that  
would accept a  
PO#

# Managing Your Club's Budget

- 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 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

# Managing Your Club's Budget

## Out-of-pocket purchase

- Get a Tax Exempt form from Sub Board I before making any purchases!!
  - 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

# Managing Your Club's Budget

## ➤ 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 [sbi-to@buffalo.edu](mailto:sbi-to@buffalo.edu) 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](mailto: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 (Finance Committee, Election Committee, Services Committee, SBI Board of Directors, etc.) please contact the GSA office for more information.

# More info

- All clubs must complete the University Recognition process by updating their UBLinked page. This must be completed by **Friday, October 12<sup>th</sup>** or your club's funds will be frozen by Campus Life.
- All updated activation paperwork (Officer election, Senate election, New Student Orientation sign-in and Membership list) are due by **Monday, October 2<sup>nd</sup>** or your club's funds will be frozen!

# Questions?



GRADUATE STUDENT ASSOCIATION