



STUDENT ORGANIZATION FINANCE POLICY

CSU-PUEBLO STUDENT ORGANIZATION SOF GRANT AND FINANCE POLICIES

STUDENT ORGANIZATION FINANCE COMMITTEE

The Student Organization Finance Committee is responsible for management of, allocations and supervision of the entire Student Organization finance process.

SOF GRANT PHILOSOPHY

The Student Organization Finance (SOF) Grants are available to any registered Student Organization for programs and events that enhance the registered Student Organization for programs and events that enhance the overall quality of student life on campus. SOF Grants should be used to boost the overall educational experience of students through development of, exposure to, and participation in social, cultural, intellectual, recreational, governance, leadership, group development, campus and community service, and informational programs and activities. These policies comply with federal, state, and local laws as well as University policies as specified in the CSU-Pueblo Student Handbook.

ELIGIBILITY OF THE SOF GRANT REQUESTS

Any Student Organization that is currently registered and in good standing with the Office of Student Activities and the University is eligible to apply for SOF Grants.

Registered Student Organizations may request grants from the Student Organization Finance Committee. These grants are intended to support organization activities, but not to fully fund organizations. Student Organizations are not guaranteed funding. Grant funding for an organization will be based on the SOF Committee's evaluation of the organization's requested events, submitted budget request, presentation, available funds, and information gathered during financial workshops with the Office of Student Activities.

SOF GRANT PROPOSALS

Student Organization officers should complete a SOF Grant Proposal and a letter explaining the request. The same form will be used for all three funding categories. Submission of a grant request does not automatically entitle a Student Organization to receive funds.

SOF FUNDING CATEGORIES

Three funding categories differentiate expenditures – operations (10%), programming (70%), and travel (20%). All requests and expenditures are categorized into one of these three categories. All awarded funds must be expended no later than June 1st. Any awarded grants not encumbered by June 1st will be forfeited. These monies are funded through Student Fees. Grants are contingent on availability.

OPERATING FUNDS

Operating funds may be requested annually at the time of registering the Student Organization to support day-to-day operational expenses of registered Student Organizations. Grants are used for the purpose of enhancing the overall effectiveness, mission, and presence of student organizations on campus.

1. Operating funds may not exceed \$100.
2. Operating funds may be spent for costs within the following limitations:
 1. No expenses for food at officer meetings;
 2. No expenses for salaries, stipends, or wages;
 3. No expenses for computer purchases for personal use.
3. For the purpose of this section, operating funds shall include college student media organizations, provided that a maximum of \$3,000 funding is available as start-up costs for the first year, with declining future requests outlined in a marketing and business plan.
4. Operating funds are intended for startup expenses.

PROGRAMMING FUNDS: EVENTS

Programming funds are awarded to support events that enhance the educational, cultural, and social experience of CSU-Pueblo students and events that are available for participation by the entire student body. Funding for student media organizations is accomplished through operating funds only.

1. The SOF Committee will award funds requested for campus security and emergency services as deemed necessary.
2. The maximum a registered Student Organization can receive per fiscal year is \$3,000.
3. Programming funds may be spent with the following stipulations:
 - a. \$100 maximum for food, per event holding fewer than 25 people;
 - b. \$750 maximum for food, per event holding greater than 25 people;
 - c. No more than \$10 per person per event for food.
4. Programming funds may not be used for the following:
 - a. Services or ceremonies that are religious or political in nature;
 - b. Events that are limited to organization membership;
 - c. Salaries or stipends of CSU-Pueblo full-time Faculty or Staff;
 - d. Programs that are held off-campus.
 - e. Other stipulations and regulations are under General Funding Policies and Guidelines
5. At least 10% of the cost of each event must be funded by the Student Organizations through self-generated funds, or sponsorships with other entities. As such, Student Organizations will be responsible for at least 10% of the total cost of any event. Student Organizations will be required to show proof of the availability of funds.
6. Event funding in excess of \$3,000 for any specific requires the Dean of Student Life's prior approval before submitting the grant request to the SOF Committee.
7. Programming funds help to provide funding for events, activities, and programs during the fiscal year (July 1 to June 30).

PROGRAMMING FUNDS: FUNDRAISING

1. All fundraising initiatives (with or without SOF Grant funding) must be approved by the Director of Student Activities, who may seek further review from the Foundation Office.
2. Student Organizations may request grant funding for organizational fundraisers. The SOF Committee may award startup costs to enable the proposed fundraiser. Student Organizations must repay these startup costs within two (2) weeks after the fundraiser as outlined below.
 - a. The SOF Committee may negotiate a repayment of between 50% and 100% of the funds awarded. This stipulation shall be noted at the time of granting the award.
 - b. All self-generated funds by Student Organization shall remain in that Student Organization's self-generated account and shall be carried forward to future fiscal years.
 - c. All funds generated through any Student Organization fundraising effort must be deposited into the Student Organization's University account by the following business day.

TRAVEL FUNDS

Travel funds are awarded to support and assist with travel expenses that directly aid the organization in achieving its mission. Travel includes conferences, training sessions, competitions, and other off-campus events.

1. Travel grant funds must be spent in compliance with CSU-Pueblo and The State of Colorado travel guidelines and policies.
2. Funds to support participation in tournaments or competitions which require qualification should be requested only after the organization has qualified.
3. No more than 50% of the total cost of travel will be awarded per request.
4. The maximum a registered Student Organization can receive per fiscal year is \$1,500.
5. Travel funds can be used to cover the costs of:
 - a. Registration and/or entry fees:
 - i. Up to \$200 per member;
 - ii. Limited to CSU-Pueblo Students only.
 - b. Lodging:
 - i. Up to \$70 per student per night;
 - ii. Limited to CSU-Pueblo Students only.
 - c. Travel:
 - i. Mileage reimbursement for trips beyond a 50-mile radius of campus only;
 - ii. At the current State of Colorado mileage rate;
 - iii. Vehicle rentals and travel tolls may be reimbursed;
 - iv. May not exceed \$500 for in-state travel per Student Organization;

- v. May not exceed \$1,000 for out of state travel per Student Organization;
 - vi. Limited to CSU-Pueblo Students only.
- d. Out of State Travel:
- i. All Student Organizations must be accompanied by a full-time faculty or staff member when traveling.
 - ii. A maximum of \$300 will be awarded for assisting a full-time faculty or staff member with travel expenses.

GENERAL FUNDING POLICIES AND GUIDELINES

Funding from all three categories (operating, programming, and travel) must comply with the following policies:

1. The SOF Grant Philosophy shall serve as the basis for awarding all grants.
2. The grant request form must be filled out in its entirety and typed. (Student Organizations are encouraged to meet with the Director of Student Activities prior to submission of the grant request). All proposals must include the following attachments (where appropriate):
 - a. Quotes from vendors and suppliers for each requested expense item.
 - i. If the expense item is less than \$250 in value, please provide one quote or similar documentation from vendor or supplier.
 - ii. If the expense item is over \$250 in value, please provide two quotes or similar documentations from vendor or supplier.
 - b. If the grant proposal includes a lecturer, guest speaker, or performance, the request must include a letter from the individual or agent:
 - i. Explaining the agenda,
 - ii. Qualifications and experience,
 - iii. The proposed honorarium, and
 - iv. Confirmation of availability.
3. SOF Grants expenses will be paid directly from the grant fund. For this reason, Student Organizations must submit a completed and signed W-9.
4. Representative(s) of Student Organization must contact the Office of Student Activities three (3) weeks prior to the event in order to develop contracts with speakers, bands, caterers, etc.
5. Student Organization officers or representatives may not commit the Student Organization or the University to an expense. The Office of Student Activities must handle business transactions dealing with SOF Grants. If proper accounting procedures are not followed, the Student Organization officers may be personally responsible for the expense.
 - a. Officers, members, or advisor are not permitted to sign contracts of any kind.
 - b. Members should not commit to events until SOF Grant funding approval is final. (A verbal contract may be considered legally binding). The SOF Committee is not obligated to fund an event arranged prior to approval of grant funding. Finalizing any contract is contingent on funding, and contingent on receiving necessary purchasing documentation from the University.
6. No money will be released for purchases until all paperwork (University business procedures) is finalized, including signatures and approvals. Grants may not be used to reimburse expenses incurred prior to funding approval.
7. All Student Organization publicity for programs sponsored by the SOF Committee must have the SOF Logo (available at <http://studentorganziation.colostate-pueblo.edu>) or an alternative tag line (such as "Student Fees at Work"). All tag lines and logos must be clearly visible on all publicity.
8. Unallowable Expenses:
 - a. Activities not included in the original proposal;
 - b. Activities designed to promote a single political candidate or issue;
 - c. Activities that are not open to all students or those that do not comply with the University's non-discrimination policy;
 - d. The purchase of alcohol;
 - e. Donations, contributions, scholarships, grants, financial aid, legal services, religious or political proselytizing or sponsorship of public elections;
 - f. Activities which are linked to academic courses or for which academic credit is awarded;
 - g. Items for personal use.
9. Any Student Organization that does not abide by the requirements listed in these policies and guidelines may be deemed ineligible to receive grants from the SOF Committee until these policies have been met.

HELPFUL HINTS WHEN APPLYING FOR SOF GRANTS

1. Make reasonable and practical requests. The theory that "if-you-ask-for-more, you will-receive-what-you-need" is inaccurate. If the SOF Committee finds inflated requests in the grant proposal, the allocation may be less than what your organization really needs.

2. Be specific when requesting line items. If it seems questionable, explain your request, providing sufficient information so the committee understands the need.
3. Discuss the request with your organization members and the advisor. The committee will always review requests favorably if it appears to be supported by the organization.
4. Discuss the SOF Grant request with the Director of Student Activities; we are always here to help you create the best request.
5. Have a location for your event reserved. To reserve a location for your event call Auxiliary Services at 719-549-2161. *Depending on the time, location, catering, and nature of your event, additional charges may apply. Make sure to ask about the cost of holding your event in the location you choose.*
6. Involve your advisor in all aspects in program planning and implementation.
7. Proposals may be judged for the quality and clarity of the presentation to the committee. The use of PowerPoint and other visual aids is recommended.
8. The Office of Student Activities can be a vital resource in program planning and implementation. For advice or questions, call the Director of Student Activities at 719-549-2151.

APPLICATION AND REVIEW PROCESS:

1. Student Organization Officers are responsible for developing and submitting SOF Grant Proposals for each event, series, or travel.
 - a. Applications are available at <http://studentorganizations.colostate-pueblo.edu>. Click on SOF Grants on the left navigation bar. Click on SOF Grant Proposal to download.
 - b. Complete and type the SOF Grant Proposal and Itemized Budget Request in full.
 - c. Strongly Recommended: Meet with the Director of Student Activities to review your SOF Grant Proposal before final submission.
 - d. It is the Student Organization's responsibility to apply for grants and initiate paperwork for expenses in a timely manner. To be timely, organizations must plan head and submit proposals at least 3 weeks in advance of the activity or travel.
2. Attach the completed SOF Proposal form and a letter addressed to the SOF Committee explaining the following items about the proposed operating, programming, or travel grant request:
 - a. A brief history and description of your organization;
 - b. The proposed event title and how this event, project, or activity meets your organization's mission;
 - c. A detailed description of the proposed event, project, or activity including all logistical aspects (i.e. venue, targeted and expected audience, research on performer/speaker, information about the conference, travel or program logistics, etc.);
 - d. A description of your line item expenditures and revenues;
 - e. Methods of promotion and advertizing;
 - f. A statement of support from your Student Organization Advisor;
 - g. Methods of evaluating the success of the event, project, or activity.
3. Attach all required supporting documentation such as quotes, estimates, proposals, biographies, etc. (This includes two proposals for each line item that is over \$250 to be used as a comparison).
4. Submit the SOF Grant Proposal to the Office of Student Activities (OUC 002) at least three (3) weeks prior to the date of proposed activity.
5. The proposal will be reviewed at the next SOF Grant Review.
6. At least one officer listed on the leadership roster for the presenting Student Organization must be present at the SOF Grant Review with a prepared five to ten minute presentation about the proposed activity or travel. The SOF Committee may ask questions to the presenting Student Organization.
7. All presentations are open to the public.
8. After the review, SOF Committee will deliberate and award funds.
9. Student Organizations must contact the Director of Student Activities within two business days of the SOF Grant Review to be notified of the awarded grant decisions and initiate the necessary procurement processes.
10. Grant monies are not transferred to the Student Organization's account. Expenses are processed through a central grant account managed by the Office of Student Activities.
11. A submission of a SOF Grant Proposal does not guarantee an award. If a Student Organization incurs an expense or commits to a purchase or speaker without prior SOF approval, the Student Organization shall be PERSONALLY responsible for paying that expense.

SOF COMMITTEE:

The SOF Committee, composed of seven (7) students, makes all grant funding decisions. The SOF Grants shall be fiscally managed and administered by the Office of Student Activities. The committee shall be structured as follows:

1. Associated Students' Government's SOF Senator (chair of committee),
2. Four (4) ASG appointments (two recommended by ASG president, two recommended by the COF senator),
3. Two (2) students at-large (appointed by the Director of Student Activities),
4. The Director of Student Activities (non-voting advisor).

MEETINGS AND QUORUM:

1. Quorum shall be any three (3) voting members.
2. SOF Grant Committee shall meet twice a month in the fall and spring semesters (or more frequently as agreed by the chair and the Director of Student Activities).
 - a. A schedule of meetings will be posted on the Student Organization website (<http://studentorganizations.colostate-pueblo.edu>).

BASIS OF GRANT DECISIONS:

Programs that seek to elevate the quality of education through co-curricular experiences will be considered a priority. The SOF Committee shall make decisions based on viewpoint-neutral criteria as listed below:

1. Student Participation
 - a. The number of CSU-Pueblo students active in the organization
 - b. The number of members active in planning, developing, coordinating, and implementation of the proposed activity.
2. Completed Proposal
 - a. The application must:
 1. Be submitted by the appropriate deadline and submitted 3 weeks prior to event.
 2. Be filled out completely and thoroughly – including, but not limited to:
 - Adequate descriptions of event;
 - Adequate goals for event;
 - Complete, detailed and thorough description of expenses;
 - Complete, detailed and thorough description of fundraising;
 - Budgets must be correctly added.
 3. Contain complete, detailed, and thorough backup documentation to include but not limited to:
 - Bio of speaker, performer, or conference/travel schedule;
 - Cost estimates (provide as much detail as possible);
 - Correspondences;
 - Support items.
 4. Two quotes must be submitted for each requested item over \$250 (e.g. foods, music, travel, support items, etc...). One quote must be submitted for each requested items \$250 or less.
3. Financial Dependency – Extent reliance on grant funds verses obtaining alternative funding or use of self-generated funds.
 - a. Co-sponsorships
 - b. Active collaborative efforts/sponsorships from other student organizations or departments
 - c. Involvement in fundraising, dues, and other self-generated funding
4. Presentation
 - a. The representatives of the student organization must be knowledgeable of the activity and adequately answered questions of the committee
 - b. The representatives of the student organization should have professionally presented the proposal to the committee. Use of PowerPoint or other visual aids is recommended
5. Cost Mitigation
 - a. The honoraria requested must be in range similar to other speakers / performers
 - b. All expenses must be in range of items used in similar events
 - c. Budget items cannot be requested for items that could or should be donated, free, provided by other sources, or obtained at a lower cost
6. Uniqueness
 - a. The event should not duplicate an event already held in the current semester unless proper justification is provided explaining the need for a similar event.
 - b. Format of event must be unusual or unique events are highly encouraged

7. Event Management
 - a. The event must be open to all CSU-Pueblo students
 - b. Adequacy of facilities and venue
 - c. Scheduling of venue through appropriate University department
 - d. Other relative logistical requirements. (Consult with Office of Student Activities for planning details that might include consultation with other University Departments, Security, Risk Management, Facilities, etc.).
 - e. An estimated attendance figure is required.
8. Promotion
 - a. Advertising and promotion plan must be submitted with grant proposal that will include the description and method of advertising and extent of advertising.
 - b. Promotion efforts should attempt the entire campus.
 - c. Methods of promotions should be appropriate for the event.
9. History
 - a. The following will be taken into consideration:
 1. Prior management of funds.
 2. Completion of an event survey.
 3. Success of past events
 4. Events have met the organization's goal for the event.

The SOF Committee considers proposals for the grant funding of specific events by reviewing requests item-by-item. Student Organizations must submit a SOF Grant Proposal with an Itemized Budget Request detailing all information completed and typed. If the request is approved by the SOF Committee, the funds may only be used as stipulated by the SOF Committee's decision, or as per the original request.

Members of the SOF Committee cannot vote on any proposals that they are directly connected to through affiliation or membership. Funding is allocated on a first come, first served basis, until grant funds are depleted. Student Organizations are encouraged to apply as early as possible.

Student Organizations may be asked for information about other activities and functions done in the past in an effort to ensure that active student organizations receive the benefits. Partial awards may be offered with fundraising recommendations.

SOF FUNDING POLICY EXCEPTIONS

Student Organizations may seek an exception from specific parts of this policy if that policy prevents the Student Organization from accomplishing its mission. Such exception requests should be submitted to the Director of Student Activities with the completed SOF Grant Proposal and Itemized Budget Request. The Director of Student Activities will consult with the Dean of Students prior to making a decision.

SOF GRANT APPEALS

Appeals are limited to the process of receiving funds itself. Amounts in the Finance Policy are not subject to appeal and thus must be followed by the SOF Committee. Student Organizations must submit a letter of appeal to the Associated Students' Government Executive Committee c/o Dean of Student Life within three (3) business days of the date of notification of the grant decision. The letter of appeal must include the specific policy or guideline being questioned.

The ASG Executive Committee may choose to deny the request or uphold the appeal and return the request back to the SOF Committee for reevaluation.

FAILURE TO ADHERE TO REGULATIONS:

Uncompleted proposals or proposals from Student Organizations not registered with the Office of Student Activities will not be considered for grant funding or approval.