



UNIVERSITY of ROCHESTER
STUDENTS' ASSOCIATION
GOVERNMENT

STUDENTS' ASSOCIATION APPROPRIATIONS COMMITTEE Business Manager Manual

University of Rochester Students' Association 2024-2025

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Students' Association
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Overview Students' Association Appropriations Committee (SAAC)

The Students' Association Appropriations Committee (SAAC) is responsible for managing the finances of the Students' Association in a way that is both fiscally responsible and in the best interest of the University of Rochester student body. The Students' Association (SA) budget is funded entirely by the Undergraduate Student Activity Fee which is contributed by each full-time student, as part of their tuition. For this reason, it is a top priority to allocate funds fairly and in a manner that will cultivate positive student experiences.

SAAC is comprised of the Students' Association Treasurer, Deputy Treasurer, Student Accountants, SA Senators, Director of Student Activities, and Manager of Finance & Administration.

In addition to the daily tasks of monitoring an organization's transactions and being the primary point of contact for Business Managers' questions, the committee meets on Tuesday nights at 7:30 PM to hear student organization requests for supplemental funding. Each spring, the committee reviews budget submissions and allocates funds to eligible student organizations for the upcoming year.

Budgets are available for use starting on the first day of class each academic year unless pre-arranged with SAAC and the Student Organization Finance Office, known as "SOFO."

The majority of transactions for College Student Organizations will occur in SOFO. SOFO is located in the Ruth Merrill Center in Wilson Commons, room 101E. The office is open Monday through Friday, 8:30 AM until 4:30 PM. If SOFO is closed due to unforeseen circumstances, please email the SA Treasurer or the Manager of Finance & Administration for assistance. Transactions processed by SOFO include (but are not limited to) online orders, credit card pick-up, Copy Center order placements, Purchase Order requests, payment of invoices via check, payment of internal U of R vendors (including Meliora Catering, ECM, and Facilities), and payment of contracts for individual service providers and vendors.

Students' Association – Principles of a Student Organization

The Student's Association Senate aims to support an organizational system that allows students to pursue their interests while focusing their energy in ways that promote community on the River Campus. The Principles of Student Organizations are designed to encourage more collaboration, more community-directed programming, and fewer self-serving activities. In order to gain recognition as a College Student Organization, an organization must fulfill all of the Principles.

The Principles can be found on the SA Government Website.

[Student Accountants](#)

Student Accountants are undergraduate students who are selected by SAAC members after an application and interview process. Once selected, Student Accountants are confirmed by SA Senate. Student Accountants are responsible for documenting Student Organization income and expenses, approving and processing paperwork submitted to SOFO, hearing and voting on Supplemental requests, and participating in the annual Budgeting Allocation process. Student Accountants work closely with Business Managers throughout the year and during the spring to help with the budget submission process.

For those who may be interested in becoming a Student Accountant, selections are open to the entire student body and include an application and interview process. This process will be publicized when open applications are available online through JobLink. Student Accountants must hold regular office hours in SOFO throughout the year. A link to the Student Accountant Office Hours can be found below.

[Student Accountant Office Hours](#)

Student Accountants typically hold office hours up to 5 hours per week, but Business Managers are encouraged to make an appointment with their Student Accountant if the scheduled office hours conflict with their schedule. Office hours for each accountant are available online via the link above and will be posted outside the SOFO door. If you have questions or concerns regarding your budget, monthly reports, or transaction processes, please do not hesitate to contact your Student Accountant or the Treasurer. If you have questions or concerns regarding SOFO, please contact the Manager of Finance & Administration. We are here to help you and want your organization's activities and programs to run smoothly. A link to the Student Accountant Category assignments can be found below.

[Student Accountant Category Assignments](#)

[Business Manager Roles & Responsibilities](#)

As a Business Manager, you are responsible for accurately tracking your organization's transactions, ensuring that they are in line with the itemized budget that was approved during the annual budgeting process, and initiating transactions in the Student Organization Finance Office (SOFO). It is of utmost importance that you, as the Business Manager, are aware of your organization financial status at all times. Please read through your budget as well as the guidelines within this manual to familiarize yourself with the proper use of your organization funds. If at any time, you are unable to act on your organization's behalf, please notify your Advisor and the SA Treasurer. During emergencies (with proper authorization from the Treasurer) other e-board members may be permitted to transact on your behalf after an Exception Form is submitted and they complete the Business Manager Quiz.

Below is a brief list of your responsibilities as Business Manager (please note that this does encompass all Business Manager duties):

- Ensure that your organization is spending within the parameters of your SOFO account and/or itemized budget.
- Submit and track all Organization transactions to SOFO for processing
 - Please allow 2 – 3 business days (Monday – Friday) for processing
- Work with your e-board to submit and/or ensure submission of Activity Reflection form through the CCC for all events hosted by the Organization within 2 weeks of the event date.
 - Budgets and future Supplemental requests may be negatively impacted if Activity Reflection forms are not completed within 2 weeks of program occurrence.
- Maintain the respected name of the Students' Association of the University of Rochester by properly handling transactions, initiating payment of bills in a timely manner, and using courtesy and common sense.
- Keep complete and accurate records of your organization's finances.
- For Budgeted Student Organizations, plan & submit a budget to SAAC that adheres to budgeting guidelines outlined in the "[Funding Guidelines](#)" section.
- Reach out to your student accountant for any and all questions you might have.
- For Budgeted Student Organizations, discuss deviations from your organization's submitted budget with your Student Accountant well in advance and complete an exception form. In general:
 - Reallocations of \$300 or less will be reviewed by your Student Accountant
 - Reallocations between \$300 and \$999 will be reviewed by SAAC Leadership.
 - Reallocations of \$1,000 or more will be heard before SAAC in the format of a Supplemental hearing.

Funding

Funding Limitations

Article V- Section Two Letter F of the Organization Administration & Review Committee Guidelines regarding Funding Eligibility states:

"Funding shall not be granted to:

- a. Student organizations whose purposes and programs violate the constitutional discrimination policy found in Article V, Section 2
- b. Student organizations whose purposes and programs are religious or political in nature
 1. Flat funding is available for religious and political organizations through Appropriations Committee
- c. Student organizations whose purposes and programs are political in nature
 1. A SA funded organization may not explicitly advocate for or against a political party, candidate, or public official

- i. Exception: A SA funded organization may still receive funding if they criticize or support a public official's, political candidate's or political party's policies and actions
2. Student organizations that set a precedent that may lead to the future funding of a limitless number of similar organizations
3. Flat funding is available for political organizations that satisfy the above criteria through the Appropriations Committee"

SAAC Funding Types

- Flat-Funded
- Itemized Budget
- Supplemental Only

Flat-Funded

Flat-funded student organizations receive a standard amount of funds each year, do not submit a budget and are not required to attend the Business Manager Budget Training sessions. They are required to adhere to SOFO & SAAC policies related to transactions and MUST send a Business Manager to the [Fall Leadership training](#).

Flat-funded organizations fall under one of the categories listed below:

- *Class Councils*
Class Councils receive a predetermined amount of funding per academic year (the Senior Class receives additional funding from the Senior Student Activity fee). This amount is \$12,000 for the 2024-2025 academic year.
- *GIM*
These organizations receive a certain amount of funding each academic year which has reduced limitations. For example, a GIM organization can spend their entire allotment on food for their individual members, whereas Budgeted organizations cannot. In general, Student Organizations that fall under the following Categories are considered "GIM":
 - Political and Religious organizations: Receive \$100 annually to be used for General Interest Meetings (GIMs)
 - Academic/Pre-Professional: Receive \$200 annually

Itemized Budget

Itemized budgeted organizations are Student Organizations that participate in the annual budgeting process during the spring semester of each academic year. All budgeted Student Organizations are automatically allocated \$100 per academic year to hold General Interest Meetings. **These funds are specifically for GIM related expenses and cannot be reallocated. GIM events need to be open to everyone.**

College Student Organizations that receive funding via a budget are not permitted to be exclusive or selective in nature (i.e. requiring auditions or application to be a member of the Student Organization).

Supplemental Only

Organizations that do not receive funding through the Annual budgeting process or GIM funds (typically Fraternity and Sorority Organizations and any College Student Organizations with “Closed” membership) fall into the Supplemental Only funding type.

Organizations in this category can only request funds from SAAC by submitting a Supplemental Funding request. All submissions will be reviewed based on the [Supplemental Funding policies](#).

Expectations for Use of Funds

Student Organizations that receive funding from SAAC must follow SAAC Funding Guidelines in addition to the Policies listed below.

Advertising

There must be sufficient campus-wide publicity for all activities. Any Organization hosting an event, activity, or program where any of the following are true, must include the applicable statement(s) in a clearly visible location on their advertisements, in a minimum font size of 12 point.

Budgeted Events

All organizations that receive funds from the SA through the Annual Budgeting Process must include the following statement in their advertising:

“ _____ is a SA funded organization.”

Sponsored Events

In relation to Student Organization Programs, Sponsor is defined as:

- *The Primary entity(s) responsible for contributing significant financial or in-kind resources associated with an event, activity, or program and is NOT responsible for the planning and/or coordination.*

Funding Sources include (but are not limited to) Supplemental Funding, Funding Portal submissions, departments, other student organizations, local businesses, etc.

Student Organizations that receive funding or in-kind contributions from sponsors must include the following statement in their advertising:

“Sponsored by: _____, _____, and _____”

In relation to Student Organization Programs, Co-sponsor is defined as:

- Additional entity(s) contributing financial or in-kind resources towards and event, activity, or program.

Student Organizations that receive funding or in-kind contributions from Co-Sponsors must include the following statement in their advertising:

“With additional support from: _____, _____, and _____”

Note: Organizations that receive funds from another co-sponsoring department should submit a Financial Transaction Request Form to SOFO so that the funds can be transferred into their account.

Host

In relation to Student Organization Programs, Host/Co-host is defined as:

- The Primary entity(s) responsible for the planning and coordination of an event, activity, or program and *may* also be a primary financial contributor.

Special Guests

SAAC understands that Student Organizations may not always have the financial resources to contribute to an event, activity, or program monetarily and instead choose to guarantee that a certain number of members will attend on behalf of their Organization.

In these instances, Special Guest is defined as:

- Organization(s)/Department(s) that have a predetermined number of members committed to attending an event, activity, or program.

As there is no financial or in-kind resource contribution, it is not permissible to use the term Sponsor or Co-Sponsor in this instance.

The recommended terminology for advertising is:

“Hosted by _____ with special guests from _____, _____, and _____.”

Restrictions on Using SA Funds to Pay Organization Members

Student organizations are not permitted to use their SA funding to pay members of the same group. For instance, if a member wants to perform at an event, they cannot be paid using the organization's funds.

Catered Meals

Student Organizations that are selling tickets to a Catered event, must include the following terminology ***prominently*** on their signage:

“Tickets for catered events will not be sold at the door. All tickets must be purchased at The Common Market (*and/or online*) by XX/XX, X days before the event.”

Note: Student organizations need to ensure that an outside caterer is approved by the Department.

At the Door Ticket Sales

Student Organizations that are interested in selling tickets at the door of their event, must include the following terminology ***prominently*** on their signage:

“All tickets that are sold at the door, will be at General Public price. Tiered pricing, if applicable is available at The Common Market up to ____ hours into the event.”

Disclosure for Special Accommodations

All publicity directed to the general public ***must*** contain the following statement, in 9 to 12 point font, and include the active handicap symbol:

“Anyone requiring disability accommodations should contact Wilson Commons Student Activities at wcsa@rochester.edu. This request should be made at least five (5) business days in advance of the event.”

SA Property

All Equipment or Supply purchases made on behalf of College Student Organizations, particularly those purchased with SA funds, are considered the Property of the Students' Association. Should an organization be de-recognized, all items must be returned to the SA.

Equipment purchased with SA funds cannot be removed from Campus without prior approval from the Students' Association Treasurer and Director of Student Activities.

It is an expectation that each Student Organizations maintain an up-to-date equipment and inventory list. Items that are no longer functional/useable must be notated as such prior to disposal/removal from the Organizations inventory list. Inventory lists will be requested by SAAC annually, usually prior to budgeting. Failure to submit an inventory may result in a denial of budget submission.

Supply Closet

Student organizations are encouraged to use the supplies available in the Supply Closet for their events. The supplies include cutlery, cups, plates, balloons, table coverings, and many others. To access these supplies, the student organization needs to submit a Resource Request form at least 14 days prior to the event. If the form is submitted less than 14 days prior to the event, SOFO does not guarantee that the supplies will be provided. After the event, students must return the reusable supplies to CIC desk, following the steps outlined in the Resource Request form.

Student organizations are not allowed to use their budget to purchase supplies that are available in the Supply Closet. For instance, students cannot use a SOFO Walmart card to buy cutlery or table coverings for their event if these items are available in the Supply Closet.

List of the supplies available can be found [here](#).

Reimbursements

Any organization that incurs expenses by transacting independently of SOFO with their own funds and without prior approval will not be reimbursed.

Ticketing

All ticketed events must be sold through the Common Market. Updates to the ticketing policy can be found at the link below:

[Wilson Common Ticketing](#)

Violations to Policies

If a College Student Organization is not adhering to SAAC or SOFO policies, the Treasurer and SAAC Leadership Team may place the organization on Probation. During this period, the organization must provide monthly reports to their Student Accountant about their activities, how many people are attending their meetings, and any other information that the Student Accountant and Treasurer deem necessary. During the probation period, SA organizations may only present a request for supplemental funding to SAAC with the approval of their Student Accountant, Advisor and the Treasurer. Furthermore, organizations may only receive a budget equal to or less than their previous budget during the Probation period.

Supplemental Funding

A sum of money is set aside during budgeting each year that will be distributed by Committee Action. This money is intended for use by organizations for expenditures related to a new event, program, or activity and/or unexpected expenses that were not included in their approved budget. This may include unexpected equipment needs, new programs or expanded costs for a budgeted program, or attendance at a conference. Supplemental funding cannot be requested for an event that has already occurred. Money obtained through supplemental funding requests must be used within all SAAC guidelines. *Only College student organizations are eligible for supplemental funding; Fraternity & Sorority Affairs groups can apply for Program/Event Supplemental for events, activities, or programs open to the undergraduate campus community.*

SAAC will hear up to 2 requests (excluding conference and post-season) per academic year or grant up to \$4000 per academic year per organization, whichever happens first.

How does it work?

In order to obtain supplemental funding, it is required that you meet or discuss your request with your organization's student accountant. *Meeting with your advisor prior to submission is no longer required, HOWEVER, your advisor should be aware of the request, as SAAC will verify that the request is approved by them.*

Request submissions for Program/Competition Supplemental (does not apply to Post Season) must adhere to the following submission timelines:

Large Scale Program/Events - 30 days prior to event date

Small Scale Program/Events - 14 days prior to event date

In general, an event, activity, or program is considered Large Scale if:

- It is located in Strong Auditorium, Douglass Ballroom, Wilson Commons Hirst Lounge, Wilson Commons May Room, the Palestra and the Field House
- It is open to Minors
- Substantial resources are required (extensive ECM and/or Facilities set up, Funding, increased number of public safety officers, etc.)
- A significant number off-campus attendees is expected

Any organization that failed their SOAR report from the Administration and Review Committee (ARC) in the spring semester is ineligible to apply for supplemental funding the following Fall semester.

Organizations with Endowments/Gift Accounts must discuss their request with the Treasurer prior to supplemental and/or budget submissions. Organizations with these types of accounts must explain to the Treasurer how they plan to use their endowments/gifts.

Once you have met with your Student Accountant, you will need to complete the appropriate [Supplemental Request Form](#). Please be specific when answering the questions asked on the request forms. Vague description of program details, funding needs, or other specifics will delay the process.

Once the Supplemental request has been submitted, the Business Manager can expect to hear from the SAAC Deputy Treasurer within 14 days of Submission to set the date/time slot for the Supplemental Hearing.

SAAC hears supplemental funding requests on Tuesdays at 7:30 PM. At the Supplemental Hearing, representatives from the Student Organization will be given the opportunity to explain the submission to SAAC (between 8-10 people) and will be asked questions related to their request, so it is crucial that your organization comes prepared with the specific details for your request.

Once the hearing has moved to the “Committee Discussion”, SAAC will discuss internally (with the organization present) to determine if and how the Supplemental request should be granted.

If an organization has already exhausted their 2 supplemental requests or \$4,000 cap (whichever occurs first), they should discuss with their advisor and SAAC accountant whether an exception form should be submitted to request an additional Supplemental hearing before SAAC.

Additional Funding Sources

Gift or Donations

Gifts and donations from parents, alumni, friends, etc. are viable sources of income for any student organization that banks with SOFO. Contributions via check can be written out to University of Rochester, and will need to be processed by the Advancement Office. If the contributor would like to receive documentation of their tax-deductible donation, please be sure to notify SOFO personnel at the time of deposit.

If gifts or donations are given directly to the students in the form of a check, the Business Manager should deposit the check at SOFO. Cash donations will not be accepted at SOFO and should be deposited directly at the Advancement Office. Any funds deposited through the Alumni & Advancement website will be automatically deposited into the Student Organization’s SOFO account. Gifts and donations may be used as the organization decides; such income does not count towards the annual income requirement unless otherwise indicated.

Each organization is expected to write Thank You notes for all donations. Blank Thank You cards can be picked up from SOFO. SOFO personnel will send an email on a quarterly basis to each student organization that needs to pick up Thank You cards from SOFO. Please return the finished Thank You Cards to SOFO in a timely manner, with the name of the donor clearly indicated on the envelope. SOFO personnel will address and mail the cards.

Crowdfunding at the U of R

College Student organizations that wish to raise money via Crowdfunding are required to use the University preferred platform. Donors will receive documentation of their tax-deductible donation from the University's Alumni & Advancement office.

Interested Student Organizations, must first start by discussing with their Advisor.

Use of other non-approved crowdfunding platforms may result in the forfeit of any supplemental funding opportunities.

Funding Portal administered by the Dean's Office

The Dean's Office Funding Portal was established to assist with the transfer of funds from Departments to Student Organizations.

Funding Portal requests for Student Organizations should occur AFTER funding has been requested from SAAC through the Supplemental process.

Requests submitted through the Funding Portal will be sent to the Advisor for review, prior to distribution to departments.

If an organization is requesting funds from Departments that are not currently included in the Funding Portal, they must submit a list of the contributing departments with their Point of Contact and Financial contribution amount to:

- The funding portal administrators
- Advisor
- SA Student Accountant

Policy Exception Form

The [Policy Exception Form](#) should be used for all Student Organizations that would like to request an exception to established Policies/Guidelines.

An informal discussion with your Advisor and Student Accountant is required prior to the submission of an exception form relating to SAAC/SOFO policies.

Transacting with SOFO

Financial Transaction Request (FTR) form

SOFO needs 2-3 business days to process the form. Do not expect that a form will be processed immediately. Supporting documents must be attached along with the FTR form for processing. As mentioned above, only Business Managers are allowed to transact with SOFO. If a Business Manager is unable to submit an FTR in an emergency, another eboard member can proceed if they have completed the Business Manager Quiz.

Service Providers

When submitting an FTR for service providers for an event (e.g., photographer, videographer, speaker, etc.) or referees, their W9 tax form needs uploaded along with the FTR. The W9 form needs to be hand-signed, and the date on it must match the current fiscal year.

In addition to the W9 form, for speakers/performers, a Standard Performance Agreement needs to be attached when submitting an FTR. The Standard Performance Agreement should be reviewed by the advisor and signed by the Head of Department.

Non-approved Vendors

eBay, Shein, and other international vendors are not approved by SOFO. SOFO has a business account with Amazon and prefers that students use Amazon instead of other vendors. In terms of ordering pizza for the event, SOFO prefers that students use Domino's or Mark's Pizzeria due to past issues with other pizza places.

Returns

SOFO is not responsible for processing returns. Organizations are responsible for returning items themselves.

Missing receipt

Please be reminded of the following instructions:

1. Students must submit all receipts to SOFO for bookkeeping purposes. If a receipt is not turned in, a Business Manager must fill out the Missing Receipt form. If neither of these is submitted, students will not be able to carry out further transactions with SOFO.
2. For Sunoco cards, all gas receipts must also be submitted. If a machine does not provide a receipt, please take a picture of the screen showing the amount paid for gas and send it to your student accountant or a SOFO personnel.

Late fee

Students are able to sign out specific credit cards from SOFO. These include Sunoco gas cards, Home Depot cards, Wegmans cards, and Walmart cards. To borrow a card, an FTR must be submitted in advance. Once a student has signed out a card, they must return it within 1 business day along with a receipt. Failure to return the card within this time frame will result in a late fee of \$5 per day, which will be deducted from the student organization's account.

Lucid Travel/hotel arrangements

Student organizations that need to make hotel arrangements for travel must use the third-party agency Lucid Travel to book a hotel. If students are attending conferences that offer better accommodation rates and locations, they will need to submit an Exception form to use the conference sponsored hotel instead of the Lucid Travel link.

Appendix B. 2024-2025 Contact Information

SAAC Leadership

Name	Position	E-Mail Address
Potter Flynn	SA Treasurer	pflynn5@u.Rochester.edu
Madison King	SA Deputy Treasurer	mking38@u.rochester.edu
Brian Magee	SAAC Advisor – Associate Dean of Students and Director of Student Activities	bmagee@ur.rochester.edu
Tina Muller	SAAC Advisor – Manager of Finance and Administration	tina.muller@rochester.edu

Student Accountants & SOFO Professional Staff

Name	Position	E-Mail Address
Anna Fang	Student Accountant	afang5@u.rochester.edu
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