# TABLE OF CONTENTS

Click Any of the Links Below to be Taken Directly to the Page

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Word From Your Spring 2021 Budget Committee Chair</td>
<td>1</td>
</tr>
<tr>
<td>Relevant Contacts and their Roles</td>
<td>2 - 4</td>
</tr>
<tr>
<td>Financial Leadership</td>
<td>2</td>
</tr>
<tr>
<td>Spring 2021 Budget Committee Members</td>
<td>3</td>
</tr>
<tr>
<td>Professional Staff</td>
<td>4</td>
</tr>
<tr>
<td>Guidelines for Student Group Accounts</td>
<td>5</td>
</tr>
<tr>
<td>Reallocating Funds</td>
<td>5</td>
</tr>
<tr>
<td>Student Group Budgeting</td>
<td>6 - 8</td>
</tr>
<tr>
<td>For Current Category I and II Student Groups</td>
<td>6</td>
</tr>
<tr>
<td>For Current Category III Student Groups</td>
<td>7</td>
</tr>
<tr>
<td>For Current Category IV Student Groups</td>
<td>7</td>
</tr>
<tr>
<td>For Current Category V Student Groups</td>
<td>7</td>
</tr>
<tr>
<td>For Executive Entities</td>
<td>7</td>
</tr>
<tr>
<td>Block Funding</td>
<td>8</td>
</tr>
<tr>
<td>Budget Allocation Process</td>
<td>9 - 10</td>
</tr>
<tr>
<td>Important Dates</td>
<td>9</td>
</tr>
<tr>
<td>Funding Principles</td>
<td>9</td>
</tr>
<tr>
<td>Itemization</td>
<td>9</td>
</tr>
<tr>
<td>Incremental Growth</td>
<td>9</td>
</tr>
<tr>
<td>Past Spending</td>
<td>10</td>
</tr>
<tr>
<td>Funding Limits</td>
<td>11 - 16</td>
</tr>
<tr>
<td>Essential Events</td>
<td>11</td>
</tr>
<tr>
<td>Mission</td>
<td>11</td>
</tr>
<tr>
<td>Speakers &amp; Panels</td>
<td>11</td>
</tr>
<tr>
<td>Conferences</td>
<td>12</td>
</tr>
<tr>
<td>Travel</td>
<td>12 - 13</td>
</tr>
<tr>
<td>Rental Cars</td>
<td>12</td>
</tr>
<tr>
<td>Gas</td>
<td>13</td>
</tr>
<tr>
<td>Flights</td>
<td>13</td>
</tr>
<tr>
<td>Hotels</td>
<td>13</td>
</tr>
<tr>
<td>Publications</td>
<td>13</td>
</tr>
</tbody>
</table>
Dear WashU Students,

As many of you are accustomed to hearing by now, this is a tumultuous time for many institutions. This semester, student programming will look different than usual. While we work together to combat the spread of the coronavirus, we pledge to continue to find ways to support student groups through this time and look towards a future where we can return to student programming with renewed enthusiasm and improved methods. Never hesitate to reach out if you have any questions, as I, and the rest of the Financial Leadership team, will always be available to answer.

Importantly, this guide is only for the budgeting process for the 2021-22 academic year and to document key changes to SU’s financial structure. The SU Financial Guidelines and this document will be consolidated in Summer 2021 for easier use moving forward.

Notable changes include but are not limited to:

• 90% rule: Due to the continuation of COVID-19 and the implementation of longer-term financial changes, the 90% rule has officially been eliminated.
• Enterprise Carshare: Due to COVID-19, the Enterprise Carshare program has been indefinitely suspended and all subsequent policies will be inapplicable for the near future.
• Category I student groups will now budget for their top 3 requests for the 2021-22 academic year. Any additional funding needed can be secured via a rolling appealing process and a supplemental flat funding deposit.
• Student groups who spend minimal money or currently receive a flat deposit will continue to do so.
• Current Category V student groups will continue to receive no SU funding.

If you have any questions regarding this manual, any of our updates, or your specific budget, please do not hesitate to reach out to me at budget@su.wustl.edu.

Sincerely,

Fadel Alkilani
Budget Committee Chair Spring 2021
RELEVANT CONTACTS & THEIR ROLES

SU Financial Leadership Team:

Click Here to Meet the Members of Financial Leadership

Alexa Jochims, Vice President of Finance: finance@su.wustl.edu
Talk to her about budgets, Executive Appeals, and financial policies

Bryan Peltier, Speaker of the Treasury: treasury@su.wustl.edu
Talk to him about Student Union Treasury and how your student group can appeal for money.

Fadel Alkilani, Budget Committee Chair: budget@su.wustl.edu
Talk to him about student group budgeting and your student group’s budget

Zoe Hancock, Activities Committee Chair: activities@su.wustl.edu
Talk to her about your new group’s application and changing categories
Spring 2021 Budget Committee Members:

Budget Committee gathers each semester under the guidance of the Budget Committee Chair to finalize the budgets of Category 1 and Category 2 student groups according to the designated funding caps.

BAT 1: bat1@su.wustl.edu
BAT 2: bat2@su.wustl.edu
BAT 3: bat3@su.wustl.edu
BAT 4: bat4@su.wustl.edu
BAT 5: bat5@su.wustl.edu
BAT 6: bat6@su.wustl.edu
BAT 7: bat7@su.wustl.edu
Professional Staff:

Janice Davidse, SU Business Manager - Campus Life:
Janice.davidse@wustl.edu, 314-935-5911 Office 251A in Ste 250/270 Campus Life DUC
Talk to her about SU Finances and policies, student group support and how to get involved.
Click here to schedule an appointment with Janice

Cathy Winter, SU Business Coordinator - Campus Life:
Catherine.winter@wustl.edu, 314-935-7584 Office 257 in Ste 250/270 Campus Life DUC
Talk to her about student group financial transactions.
Click here to schedule an appointment with Cathy

Katie Chandler, SU Business Coordinator - Campus Life
Katie.chandler@wustl.edu, 314-935-8217 Office 257 in Ste 250/270 Campus Life DUC
Talk to her about student group financial transactions.
Click here to schedule an appointment with Katie

Peggy Hermes, Asst Director – Campus Life:
Peggy.dixon@wustl.edu, 314-935-3962 Office 254 in Ste 250/270 Campus Life DUC
Talk to her about WUGO, GPS advising and training, general student group support and Campus Life policies.
Click here to schedule an appointment with Peggy

Will Atchinson, SU Technology Specialist – Campus Life:
Will.atchinson@wustl.edu, 314-935-3936 Office 251B in Ste 250/270 Campus Life DUC
Talk with him about WUGO access, SU hardware, software licensing, or website feature requests.
Click here to schedule an appointment with Will

Beth Doores, Assoc Director - Campus Life:
Ejdoores@wustl.edu, 314-935-4971 Office 255 in Ste 250/270 Campus Life DUC
Talk to her about getting involved on campus, finding the right group for you, general Campus Life resources and connections.
Click here to schedule an appointment with Beth

Kyra Johnston, Event Coordinator - Campus Life:
kyra.johnston@wustl.edu, 314-640-7595 Office 160 A in Ste 160 Campus Life DUC
Talk to her about event registration, programming, and Campus Life policies.
Click here to schedule an appointment with Kyra
GUIDELINES FOR STUDENT GROUP ACCOUNTS

Re-Allocating Funds

Because of the increased flexibility in the ways groups can receive funding, groups will no longer be able to (and should not need to) re-allocate funds they receive.

The budget adjustment period is the only exception to this. If your group finds that you need to increase or decrease a line item in an event/program that was previously budgeted for, you can work with the Budget Committee Chair and the Financial Leadership team to adjust your event details as needed. For example, if your group budgeted for a competition, but later found that the location of the competition changed and plane tickets were now cheaper, you should work with the Budget Committee Chair to adjust these details in your budget.

While you may spend your group’s flat funding on mission-oriented expenses, you may not budget or appeal for additional supplemental funding.
STUDENT GROUP BUDGETING
For Current Category I and II Groups

In past semesters, Category I and II groups could apply for funding for the next semester through Budget Committee. Moving forward, Category I and II groups can apply for funding for the upcoming year through Budget Committee. For example, in the Spring 2021 semester, Category I and II groups will apply for funding for the Fall 2021 and the Spring 2022 semesters. Budgets are submitted through sufinance.wustl.edu. Due dates can be found on SU Finance. Please ensure that your President and Treasurer are correctly registered on WUGO to receive important emails regarding the allocation process.

With the new budgeting process, student groups should provide an outline of their top three requests for the upcoming year. To ensure maximum flexibility in SU’s finances and less rigidity in your budgets, any additional funding needed can be appealed for throughout the year on a rolling basis or purchased using your group’s semesterly flat funding. Budget Committee will also send reminders via email.

As a reminder, your budgetary requests should include any mission-oriented events (i.e. mission events, speakers, conferences, etc.) or a large-scale social. These requests should not include apparel, GBMs, or socials.

If you are a current Category II group but spend less than $750 each semester, you will likely not need to submit a budget. SU’s Financial Leadership will let you know if your group does need to submit a budget.

Interviews
After submitting your budget online, sign up for an interview with your budget allocation team (BAT) leaders. After submitting your budget, SU Finance will prompt you to sign up for an interview. Please contact the Budget Committee Chair if you have any difficulties in signing up for an interview.

BAT leaders are Budget Committee members assigned to your student group who will present your budget to the committee and represent your interests at the overall committee meeting. All Category I and II groups are required to attend these face-to-face interviews to discuss their budget.

Interviews are informal and allow the BAT leaders to ask any questions and clarify items in their original budget. The interview also allows you to ask questions about the allocation process. Failure to schedule or attend an interview may result in a financial penalty against your allocation as determined by Budget Committee.

Allocation Meetings
Following the interviews, Budget Committee will meet to decide the allocations for each student group individually. These meetings are closed. Your budget will be presented by the BAT leaders that conducted your interview. They will represent your interests in all meetings.

Finalizing the Budgeting Process
The Budget Committee presents all Category I and II budgets to Treasury. This will happen at the end of March or early April. Traditionally, Treasury does not review each budget individually but goes over a list of allocation amounts with the committee. Students are welcome at this meeting and can contact the Speaker of the Treasury (treasury@su.wustl.edu) for the meeting time, date, and location. After the allocation has been approved by Treasury, the Budget Committee Chair (budget@su.wustl.edu) will contact you with your allocated amount and provide you with details of the Post-Allocation Engagement period.
For Current Category III Groups

In non-COVID times, current Category III groups are entitled to student group recognition and resources as well as $350 funding annually for internal group activities. Category III groups are not required to submit a budget and are not subject to the funding caps set by Budget Committee. Unused funds will be retrieved at the end of the semester.

Moving forward, current Category III groups will be listed as Category II groups and will continue to receive a flat funding deposit. This flat funding deposit will be dependent on the group’s roster of active members. Importantly, Category III groups will no longer be able to appeal for additional funding beyond their flat deposit in the new structure.

For Current Category IV Groups

In non-COVID times, Category IV groups are entitled to student group recognition and resources as well as a flat $150 per year to be deposited in the fall semester or $75 in the spring semester. Unused funds will be retrieved at the end of the fiscal year. Category IV groups do not have to submit a budget or follow any caps set by Budget Committee.

Moving forward, current Category IV groups will generally be listed as Category II groups and will continue to receive a flat funding deposit. This flat funding deposit will be dependent on the group’s roster of active members. Importantly, Category IV groups will not be able to appeal for additional funding beyond their flat deposit.

For Current Category V Groups

Category V groups are entitled to student group recognition and resources but do not receive funding from SU and may not submit appeals.

Moving forward, current Category V groups will be listed as Category III groups and will continue to not have access to SU funding. Importantly, Category IV groups will continue to not be able to appeal for additional funding beyond their flat deposit.

***Your Business Coordinator will not be able to answer questions regarding your allocation, so please contact the Budget Committee Chair at budget@su.wustl.edu if you have any questions.***

For Executive Entities

The entities of Student Union include Student Environmental Council, Social Programming Board, and LIVE. These entities submit a yearly budget to the Vice President of Finance to be reviewed through the annual General Budget process.
Block Funding

A block funding agreement is an arrangement between Student Union and a student group or initiative to provide a certain level of funding for one year. This budgeting method was created to guarantee sustained support from Student Union for high cost, long term projects. Block funded budgets also include groups who would like their budget to be voted on by the entire student body because the group’s mission offers a service to the entire student body.

A block funding budget must be passed by a two-thirds vote of the voting undergraduate student body in the spring SU election. To have your group placed on the ballot, you will need to write a proposed budget on SU Finance, go over the budget with the Vice President of Finance, and collect a petition with electronic signatures from 15% of the undergraduate student body. The budget will be shown on the petition. The group will have to go through the budget with the Vice President of Finance to ensure that it is in accordance with SU policy. The process occurs early in the spring semester.

It is important to note that while groups that receive block funding have a set budget amount for their term, ALL student group spending policies must be followed. Block Funding groups cannot appeal for additional funds.

Contact the Vice President of Finance (finance@su.wustl.edu) for more details on the Block Funding procedure and the Election Commissioner (elections@su.wustl.edu) for the exact number of electronic signatures needed and a complete list of election rules.
BUDGET ALLOCATION PROCESS

Only current Category I and II groups submit budgets. If you have any questions regarding your student group’s category, please consult SU Finance or contact the Activities Committee Chair at activities@su.wustl.edu.

Important Dates

- **February 24th, 5 pm:** Budgets Due
- **February 25th - March 7th:** Interviews with BAT leaders
- **March 30th:** Treasury approves Budget Allocation
- **April 1st:** Budgets released
- **April 2nd - April 5th:** Post Allocation office hours

Funding Principles

In order to allocate funds to SU groups, Budget Committee considers several factors. Interviews with group members and past budgets/spending histories inform Budget Committee’s decisions. Budget Committee strives for fair allocation between all 400+ SU groups. Budget Committee looks closely at:

**Itemization**

Every event and line-item in a group’s budget must contain the specific item, unit price, and unit quantity.

Budget Committee requires itemization to fully understand expenses and will NOT fund particular events or line-items in a budget if the group fails to provide sufficient itemization. Groups are also responsible for communicating information not noted on the group’s budget to their BAT leaders.

**Good Itemization**

- Holiday Inn: 1 room x 2 nights (4 people per room)................................. $218.95
- $1.20 x 3 Lemons from Schnucks............................................................. $3.60
- $1.24 x 10 Apples from Schnucks............................................................ $12.40

**Bad Itemization**

- Hotel...................................................................................................... $219
- Lemons and Apples.............................................................................. $15

**Incremental Growth**

Budget Committee considers how many events of each classification (essential or supplemental) a student group has put on in comparison to how many events of each classification (essential or supplemental) a student group has requested when determining whether a group shall be allowed to expand their programming using SU funds. Student groups will be allowed to expand their programming by one additional event for a certain classification after demonstrating consistent programming over two prior semesters.

Budget Committee will give exceptions to groups who may not have been able to program all of their allocated events in certain extenuating circumstances. All groups are encouraged to stay in touch with the Budget Committee Chair to ensure that the Budget Committee is properly informed on any event cancellations.
Past spending
Budget Committee will consider a student group’s history of programming and spending in the prior semester when deciding how many events to fund for the next semester.

How to Write a Budget

1. Decide the events your group will program the upcoming semester. You may want to look through past budgets and think about events your group programmed previously. Additionally, you can brainstorm potential programs your student group may want to consider.
2. Register as a Group leader on WUGO.
3. Go to SU Finance and click on the “Budget Entry” tab.
4. Enter each event your student group plans to put on next semester. For each event you must:
   • Select one of the drop down boxes which best describes the category of the event.
   • Enter the date of programming.
   • Enter a description of the event including where it will be located.
   • Enter the number of attendees.
   • Enter each expenditure as a separate line item under the event.
   • List the quantity, price per quantity, and total for each line item. If possible, include the brand or store.
   • Predict the costs using research on current prices and/or past expenses.
5. List your events in order of priority using the rank number at the top left-hand corner of each event. This allows Budget Committee to know which events to fund first.
6. Press “Submit.”
7. Sign up for a Budget Allocation Team (BAT) interview to further discuss the details of your budget. Your budget will not submit until you sign up for an interview.
FUNDING LIMITS (CAPS):

MISSION EVENTS

Mission events relate directly to the purpose and central mission of the group.

**Funding Limit: CAT 1: No limit**

Budget Committee will only consider a social event to be a mission event if the only purpose of the group is to program social activities for its members.

Community service events will not be funded unless community service itself is the central purpose of the group.

**Speakers & Panels**

Speakers & panels are events which host guest speakers on campus. Student groups can request an unlimited number of speakers and panels up to the funding limit.

**Funding Limit: CAT 1: $300, excluding honorarium**

**Honorarium: Up to $1,000 per speaker**

Groups must provide basic information about the speaker event (source of honorarium amount, speech or discussion topic) in their budget.

Speaker honoraria exceeding $1,000 will not be funded in Budget Committee; groups must appeal to Treasury for any speaker event with an honorarium over $1,000.

Example: The Troll Club wants to bring in a motivational troll speaker from the St. Louis area to speak about their experience in the Troll movie industry. The honorarium is based on the average fee that a troll speaker charges, as reported by troll management.
Conferences

Conferences are off-campus events that group members may attend in order to gain new knowledge or skills relating to their group’s purpose that will be beneficial to the functioning of the group and general undergraduate community. Student groups must provide budget committee with a plan for what rationale they will use to select attending members.

**Funding Limit: CAT 1:** Up to $1,000 per person with a maximum of 3 members funded in full.

*Up to one conference will be funded each semester.*

Full funding may be granted to the first three group members attending (as long as this cost does not exceed a total of $3,000), with the intention that this number of attendees will allow group members to engage in all facets of the conference and share with the group what they have learned.

Example: The annual Troll Conference takes place in Minnesota each year and the club wishes to send their president and two general body members to explore what Troll Clubs on other campuses are accomplishing.

Travel

Travel fees include the costs incurred while traveling, including but not limited to the cost of airfare and hotels. **However, the entry fee for competitions or conferences will not be considered travel expenses.**

Specific restrictions on travel costs can be found below. The funding limits will act as a subsidy if travel costs exceed what Budget Committee can fund.

In addition, student groups are required to request funds for any expected travel costs in their budgets, including events that they have a high likelihood of qualifying for, rather than through appeals. Exemptions may be granted on a case-by-case basis by the Vice President of Finance and/or Speaker of Treasury.

**Funding Limit: CAT 1:** up to $600 per participant per semester

Rental Cars

**Funding Limit: CAT 1:** No Limit

[Click here to be directed to the Campus Life Travel Policy](#)
Gas

**Funding Limit: CAT 1: up to $0.15 per mile per car**

Flights

**Funding Limit: CAT 1: up to $300 per round trip domestic ticket, or up to $500 per round trip international flights**

The international flight cap will only be applicable to student groups who would not be able to function or program their mission effectively without international travel.

Hotels

**Funding Limit: CAT 1: up to $30 per person per night**

Publications

To give Budget Committee the necessary information to make decisions on publications, print groups must clearly communicate the following during their BAT Interview:

1. Pricing tables obtained and ready to present at BAT interviews.
   - The tables should include the printing cost by number of copies and number of pages per copy.
   - Please provide a range above and below your desired number of copies.
2. Provide a concrete distribution plan detailing how you plan to distribute your publication.
   - i.e. 50 copies will be placed in the magazine racks in the DUC, 50 copies will be handed out by the underpass, etc.
3. Any revenue that printing groups expect to earn.

Each issue of a publication will be considered a separate mission event. If a printing group wants to increase the number of issues it prints, see the guidelines for increasing mission events.

All publication groups must either bring their left over copies from the previous semester to their BAT Interview, to the BC Chair prior to their BAT interview, or to the Harvey Media Center at any time prior to their BAT interview to receive funding for the next semester. Using the amount of leftover copies, Budget Committee will recalculate how many copies worth of funding will be allocated to each publication group. It is recommended that this process be complete towards the beginning of the semester, as the pricing table that is required at the BAT interview must be for the recalculated amount of copies that Budget Committee has designated it will allocate to that specific publication group.
Equipment

Funding Limit: CAT 1: $1,000 per equipment item

Insurance on Equipment: $0.50 per $100 of equipment’s original value

Equipment items must stay with the group each year; equipment that is kept by an individual student will not be funded. Equipment must be available to the entire student group.

If a group budgets for equipment, they must provide an inventory of their current equipment at their budget interview, indicating the condition of their equipment (e.g. very good, good, bad, unusable). Additionally, the group must provide current and future storage plans for any equipment requested.

Groups purchasing equipment over $500 should insure the items. The insurance cost should be added to your Operating Budget for the Spring semester. Student Union will pay for $0.50 of insurance per $100 of equipment. (For example, an item costing $500 will be insured up to $2.50 per year.)

If an item purchased with SU funds is not insured and lost or damaged, the group will be liable for its replacement. It is in each group’s best interest to insure equipment purchases of over $500.

Carshare + Ride-Sharing Apps

Carshare will not return for the 2021-22 academic year. When preparing your budget, please estimate the cost of transportation that your group will need via ride-sharing apps including Uber and Lyft. Groups that have been allocated money for this purpose may not reallocate this funding to any other events under any circumstances. Budget Committee will decide how many Carshare hours a student group is allocated for based on past use of Carshare hours. If your group is not able to use a certain number of Carshare hours, please inform the current Budget Committee Chair (budget@su.wustl.edu) of your situation as soon as you can in order to avoid future confusion.
Large Scale Social Events

Large scale social events emphasize bonding for the entire student group and often include celebrating the achievements of a semester. Budget Committee will fund up to one large scale social event per semester. This includes what many groups traditionally classify as a banquet. SU will not fund individuals who are not active members of the group.

Funding Limit: up to $20 per member attending; max of one event per semester. CAT 1: No limit

The funding limit of $20 per member attending will act as a subsidy for events whose costs exceed what Budget Committee will fund. Please check page 5 for the new policy on reallocations.

In addition, student groups are required to request funds for large scale social events in their budgets, rather than through appeals. Exemptions may be granted on a case-by-case basis by the VP of Finance and/or Speaker of Treasury.

Example: The Troll Club hosts a dinner and dance at the end of the year to celebrate their achievements and celebrate graduating seniors.

All Category I student groups that have been funded for large scale social events must coordinate a relationship and sexual violence (RSV) training through SU’s partnership with the RSVP Center, LIVE, SARAH, and Title Mine. Training attendance numbers (taken through WUGO) are expected during those group’s BAT Meetings. If a group’s training has not yet occurred, group leaders should be prepared to discuss their plans for training with the BAT Leaders.

SUPPLEMENTAL EVENTS

All other supplemental funding (i.e. socials, info sessions, GBMs, apparel) will be encapsulated in the semesterly flat funding deposit that groups receive. While we recommend that groups use some form of caps or limits to spend responsibly, the group will be able to decide how they want to spend their supplemental funding. This supplemental funding does not include large-scale social events, which must be budgeted for and will now be treated as an essential event.
MISCELLANEOUS EVENTS

Coaches

All groups with coaches must submit coaching contracts through the budgeting process, to be reviewed by Budget Committee. If a contract has not been set by the budget submission deadline, groups may choose to submit these contracts to Vice President of Finance for that semester. If groups appeal for the contract’s first semester, they must request these coaching funds in their budgets for all subsequent semesters.

A new contract must be submitted to Budget Committee if a group replaces a coach and hires a new one. The burden of firing or replacing coaches falls within the discretion of the team. Groups must also submit a new contract to Budget Committee if the price of coaching services changes. These contract changes will not be seen by the Vice President of Finance.

Funding Limit: up to $750 per semester, regardless of the number of coaches

The funding limit of $750 will act as a subsidy for contracts that exceed what Budget Committee will fund. If a student group spends more of their budget on coaching than Budget Committee’s allocation, the additional funds used by the group to fund the coaching fees will be seen as a misallocation of funds. (See “Misallocation Policy” on pg 10 for more details).

Sports Clubs are prohibited from paying student coaches using Student Union funds.

Buttons

Student Union offers all student groups 100 buttons per semester at no cost.
Student Union reserves the right to update or add additional policies as needed throughout the academic year.