Funding Policies & Procedures for Registered Student Organizations

2017-2018

FINAL VOTED ON APRIL 10th, 2017

**Funding Purpose**
The Office of Student Engagement (OSE) in conjunction with the Registered Student Organization Funding Board (RSOFB) distributes funds collected by the Student Organization Fee to registered student organizations for the purpose of providing programs, projects, and events that help the organizations succeed in meeting their goals and foster positive student development.

**Office of Student Engagement**
The Office of Student Engagement is the primary liaison for registered student organization funding. They distribute and collect funding applications, advise the Funding Board, manage all student organization fee monies and work with funded organizations to spend and track their allocated money. They do not make any funding decisions.

**Registered Student Organization Funding Board (RSOFB)**
The Registered Student Organization Funding Board will be the primary decision-making body in allocating the student organization fee to registered student organizations.

**Mission**
The mission of the RSOFB is to assist in the allocation of funds to student organizations registered with the Office of Student Engagement that enrich the mission of Montana State University.

**Composition**
The Funding Board shall be comprised of 6 members. 3 of whom shall be members of the Associated Students of Montana State University (ASMSU) Senate 2 of whom shall be students-at-large. The RSOFB Chair will be the Senate Vice President or designee, and will not serve as a voting member unless a tie-breaker is necessary. The Office of Student Engagement will appoint a paid staff member to serve as advisor to this board. They will not have any voting rights.

**Board Appointments**
All appointments will be made at the end of the spring semester, which will comprise the next academic years’ board.

- ASMSU seats will be appointed by Senate.
• At-large seats will be filled by application, collected by the ASMSU President. All applications will brought to ASMSU Senate for final vote and approval.
• Vacant RSOFB seats will be filled by a nomination by the ASMSU President and approved by ASMSU senate.

Responsibilities of Funding Board
The Funding Board will allocate two-thirds of the estimated student organization fee at the end of the spring semester (Mass Funding Pool) for student organization activities/programs to take place over the following academic year. The remaining one-third of the estimated student organization funding (Rolling Funding Pool) will be allocated throughout the academic year. Match Funding will be allocated based on availability of funds. The Funding Board will review the funding applications from eligible registered student organizations and select the organizations that will receive funding using the criteria stated herein. Funding Board will meet weekly from mid-September through April (with the exception of University holidays, breaks and finals weeks). The Funding Board Secretary/Student Accountant will provide a write-up review explaining the reasons for funding or not funding an organization. The Funding Board shall exercise its discretion to select programs and activities which it believes will provide enrichment of the academic experience of university students and best serve the interests of students at Montana State University. RSOFB will also be responsible for reviewing student organization funding policies, application process and any other funding-related issues or changes.

Training/Orientation
All RSOFB members will go through training, hosted by the Office of Student Engagement.

Voting
Three voting members will represent a quorum and must be present in order to make funding decisions. The RSOFB Chair will serve as a tie-breaker if necessary. Proxy voting by email for the purposes of meeting quorum or application approval between meetings is allowed.

Conflict of Interest
If a member of the RSOFB has a conflict of interest, they must reveal this to the board and are to abstain from voting. Conflict of interest is defined by if a voting member is a leader or member of an organization whose application is under review.

Budget & Allocations
The maximum allowable amount to be allocated to each organization per academic year shall be determined annually by the RSOFB based upon availability of funds and the level of requests submitted by the registered student organizations. While the RSOFB strives for consistency, a number of factors are considered when approving funding requests. Budget and available funds will fluctuate based on student enrollment.

Club Sports Funding Board
The Club Sports Funding Board (CSFB) will be responsible for allocating a portion (no greater than $50,000) of the student organization fee to registered Club Sports.

Purpose
The Club Sports Funding Board will be responsible for allocating a portion of the student organization fee to Club Sports. They will determine, by application, the tier level of each Club Sports. After the tier level for a club has been determined, the CSFB will then allocate money to the club based on their budget in the application process.

Composition
The CSFB shall be comprised of seven members. The board will be advised by the Director of Club Sports, who will not have any voting rights.

**Board Appointments**
All appointments will be made at the beginning of the spring semester.

- The Club Sports Council will make nominations for one club member from each level of the Club Sports tier system, for a total of four representatives.
- One ASMSU Senator, appointed by ASMSU Senate.
- Two non-Club Sport students will be appointed by the ASMSU President or ASMSU Senators.
- The board will have one Chairperson, who is a non-voting member, unless a tie-breaker is necessary. Chairperson will be appointed by the Club Sports Council by nomination.

**Voting**
Four voting members will represent a quorum and must be present in order to make funding decisions and tier level placements. The CSFB Chair will serve as a tie-breaker if necessary.

**Conflict of Interest**
If a member of the CSFB has a conflict of interest, they must reveal this to the board and are to abstain from voting.

**Responsibilities of Funding Board**
The CSFB will allocate a portion of the student organization fee to registered Club Sports, based on the established tier categories. The CSFB will review the funding applications from eligible registered Club Sports and select the organizations that will receive funding using the criteria stated within the Club Sports Funding Policies. A CSFB assistant or other designee will provide a write-up review explaining the reasons for funding or not funding an organization. The CSFB shall exercise its discretion to select programs and activities which it believes will provide enrichment of the academic experience of university students and best serve the interests of students within the Club Sports program and at Montana State University.

**Training/Orientation**
All CSFB members will go through training, hosted by the Director of Club Sports in conjunction with the Office of Student Engagement.

**Governing Policies**
Club Sport funding policies will be in place to guide application review. Current student organization prohibited and permitted uses for funds (stated within these funding policies) will still apply, however, additional policies will be implemented based on the Club Sports Funding model.

**Budget & Allocations**
The maximum allowable amount to be allocated to each Club Sport per academic year shall be determined by the established tier system and availability of funds. Budget and available funds will fluctuate based on student enrollment. The MAXIMUM will be $75,000. Club Sports will be INELIGIBLE to apply for Mass, Rolling or Matching Funding.

**Criteria for Funding**
To be eligible for funding, the funding proposal and organization must meet the following criteria:

1. The student organization must be currently registered with the Office of Student Engagement and in good standing (not on probation or revoked status).
2. The funding proposal must be SUBMITTED a MINIMUM of two weeks before the funding is needed.
3. The proposal is consistent with the purpose of the registered student organization, as defined in its application.
4. Events or participation in the program is open to all students of Montana State University.
5. Program or service is implemented in compliance with federal and state laws and regulations, city ordinances and university policies.

**Permitted and Prohibited Uses of Student Organization Fees**

**Permitted Uses.** The Funding Board may fund:
1. Seed monies for fundraising activities for the registered student organization.
2. Travel (domestic only, excluding Canada) to conferences and competitions related to the registered student organization purposes.
3. Registration fees for activities, events or conferences.
4. Educational programs.
5. Support for organizational operations such as publicity, office supplies, and activities of the registered student organization.
6. Movies/films to be shown publicly or to advance the purpose of the registered student organization.
7. Speakers/lectures.
8. Other activities consistent with the mission of the registered student organization.

**Prohibited Uses.** The Funding Board will NOT fund:
1. Purchase of alcohol or tobacco. NOTE: This excludes any minimum fees for alcohol service with approved university alcohol vendor.
2. Philanthropic donations, charitable contributions or gifts of any type.
4. Any organization that does not have open enrollment and does not comply with the anti-discrimination section of the RSO Policies, found HERE.
5. Any item or activity deemed excessive, not justified, and/or in conflict with the mission of the registered student organization.
6. Social functions that are not related to a program or educational event.
7. Payment to members of the organization for any purpose.
8. Funding Board will **not accept funding application requests for programs/events/activities that have already occurred. No retroactive funding.**
9. Items already purchased before funding is approved.
10. Scholarships.
11. Bank account fees (initial deposits, overdraft, monthly fees, etc.).

**Types of Funding & Process**
The funding pool is broken down into three parts (excluding Club Sports):

**Mass Funding Pool**

**Rules**
- The Mass Funding pool is allocated every spring to registered student organizations to use in the following academic year. If a club is allocated Mass Funding in the spring, they are not eligible to spend that money until after July 1st.
- Two-thirds of the estimated student organization fee comprises this pool.
- The minimum request for this pool is $1,000.
• This pool is for established student organizations that may have a plan for events, conferences, etc. for the following year.

• To be eligible to apply for Mass Funding, your organization must be a registered student organization with OSE no later than the last day of classes of the previous fall semester. For example, you must be registered by Dec. 9th, 2016, to apply for 2017-2018 Mass Funding that opens in spring 2017.

• If you are allocated money in the Mass Funding pool, you are not eligible to apply for Rolling Funding the next academic year.

• A spring application deadline will be set by the Office of Activities and Engagement.

Mass Funding Process

Step 1: Minimum of one club officer must attend a MANDATORY information session hosted by the Office of Student Engagement and RSOFB. These will be held in February and March before the application deadline. Applications will not be accepted unless this is attended.

Step 2: Submit Application. Fill out the Mass Funding application found on the Office of Student Engagement website: www.montana.edu/engagement by the set deadline.

Step 3: Application Review. The Registered Student Organization Funding Board will meet to decide on funding allocations. Organizations will be notified within two weeks of the Funding Board meeting if their funding application was approved and the total amount awarded.

Step 4: Attend Spending Orientation. An officer from your organization must attend an orientation hosted by the Office of Student Engagement at the beginning of the Fall semester to learn the process for spending your allocated money.

Rolling Funding Pool

Rules

• The Rolling Funding pool is available to registered student organizations from mid-September to April.

• One-third of the estimated student organization funding comprises this pool.

• The maximum amount awarded to an RSO will be $1,000 from this pool of money.

  o Call apply a maximum of twice in an academic year. (i.e. you can ask for $300 in November and then $700 in March). Cannot exceed $1,000 total over the year.

• This pool is for organizations that may have needs throughout the academic year and did not apply or were not awarded Mass Funding dollars the previous spring. A student organization may choose to reject their Mass Funding allocation and apply for Rolling Funding instead.

• A weekly application deadline will be set by the Office of Student Engagement.

Rolling Funding Process

Step 1: Submit Application. Fill out the Rolling Funding Pool form found on the Office of Student Engagement website: www.montana.edu/engagement by the set weekly deadline. The funding proposal must be SUBMITTED a MINIMUM of two weeks before the funding is needed.

Step 2: Application Review. The Registered Student Organization Funding Board will meet to decide on funding allocations. Clubs are permitted to send a representative to the Funding Board meeting. Organizations will be notified within one week of the Funding Board meeting if their funding application was approved and the total amount awarded.

Step 3: Schedule Spending Orientation. A representative from your organization (preferably Leader and/or Treasurer) must attend a meeting with the Office of Student Engagement after you have been notified of funding approval to learn the process for spending your allocated money.

Matching Funding Pool

The purpose of the Matching Fund pool is to support registered student organizations in their funding needs as well as encouraging external fundraising. The availability of this pool of money is reassessed every year.

Rules
• The maximum amount a club can request be matched is $500. By applying for $500, your club is committing to fundraise an additional $500. Your club may only apply once an academic year for the Matching Fund pool.

• If your club already has Mass or Rolling Funding, you are still eligible to apply. You can also apply without having either of those funding sources.

• Money must be raised through outside of your club in the form of financial donations or fundraisers. No in-kind/services or other financial donations.

• If you receive Matching Fund money, the money will be released to your group as soon as you show proof of money raised. Like the other funding pools, we will not write checks to a club, rather the money will be used for reimbursements, etc.
  o Example: You have raised $200 of your $500 goal. You show proof (see below what constitutes as proof) of raising $200, OSE will release $200 of your $500 total to your club in the form of a reimbursement.

• Money must be raised in the current academic year. You are eligible to begin fundraising before being approved for the Matching Fund, however, you must be able to show proof of funds raised during the current academic year (see documentation requirements below).

• You must raise the money and provide proof of doing so by June 1st, 2018.

• The permitted and prohibited uses of funds as stated in the RSOFB policies still apply.
  o The Matching Fund will only be available to those who raise money for club expenses. The Matching Fund will not be disbursed to charitable foundations.

Matching Funding Process
Same as Rolling Funding Process, see above.

Types of Fundraising and Needed Supporting Documentation for Matching Funding

Financial Donations
Financial donations qualify when someone (can be individual, business, organization, etc.) OUTSIDE of the organization makes a financial donation in the name of the club. Donations/Dues from members, advisors, leaders or other registered student organizations are not permitted. If we suspect student organizations are breaking or bending this rule, we will investigate and potentially withdraw current funding as well as future funding for your club. Please do not abuse this rule.

Documentation Needed of Financial Donations:

1. Copy of bank deposit slip
2. Copy of check(s) made out to your student organization from donor. No cash from individual donors or businesses, checks only.
3. Donor must fill out Donor Form (found on OSE website) addressing donation intentions.

Fundraisers
Fundraisers can be an event, program, or individual club members participating in events such as the Career Fair, working athletic events, etc. All of these DO count as fundraising on behalf of the organization.

Documentation Needed of Fundraising:
1. OSE Fundraising Report Form (found on OSE website) must be submitted, which will include:
   a. How much total money was raised
   b. How many participants were involved
   c. Copy of event advertisement or other form of proof of event.
   d. Other information at request from OSE.
2. Copy of deposit slip of funds raised into club bank account.
3. If applicable, copy of check(s) made to your student organization from fundraiser.

**Funding Recipient Responsibility**

Every club who receives Rolling, Matching, Mass or Club Sports Funding must send at least one representative (prefer leadership) to the Student Organization Leadership Conference held in October every year. If clubs are unable to send a representative, the Office of Student Engagement will be hosting a series of professional development trainings for clubs throughout the academic year. You will be asked to send a club leader to one of these in lieu of the conference. If your club does not fulfill this training requirement you may risk losing your current funding and/or the next academic years’ club funding eligibility.

**Food Policy**

Student Organizations may not spend more than $100 in club funding on food and beverages at general club meetings for the entire academic year. Special events, programs, etc., is excluded from this cap in spending.

**Procedures for use of Student Organization Fee funds**

Registered Student Organizations that receive funds from any of the funding pools must work with the Office of Student Engagement to spend their funds. Clubs may access the funds as outlined below:

1. Student Organizations MUST attend a spending orientation BEFORE they are allowed to spend any of their allocated money.
2. Funds will not be dispersed in advance and will be used only for direct payment of pre-approved expenses and/or reimbursements for items in the approved budget. All reimbursement will be made payable to the registered student organization, not to individual club members or advisors.
3. Receipts for reimbursement are due no more than 30 days after the event/activity has occurred.
4. The registered student organization is solely responsible for all expenses that exceed the amount of the allocation awarded to the organization.

**Compliance**

Failure to follow these processes and timelines may result in loss of future funding:

- Turning in reimbursement receipts within 30 days
- Turning in P-Card purchase receipts within 72 hours
- Turning in Costco forms within 24 hours
- Turning in travel forms within 10 days

If your student organization does not follow the above, you will receive a written warning first. If any of the above rules are broken a second time, the OSE has the right to revoke eligibility of club funding for one academic year.

The Office of Student Engagement and the Funding Board may suspend or revoke the funding allocation before distribution if the registered student organization has engaged in activities that violate state and/or federal laws.
or the policies of the university. The funding will be discontinued as of the date of suspension/revocation and no expenses incurred after that date will be paid.

If it is reported that any clubs, club leaders, members or advisors are misusing organization funds, OSE will report to the MSU Dean of Students Office for further investigation. All individuals involved may face disciplinary measures through the MSU Student Code of Conduct and if applicable, state and local laws will apply. The student organization may also face suspension or probation as a registered student organization.

Clubs who have funding, but are in a probation or suspension status with the university will not have access to their allocated funds until probation/suspension is lifted. If not lifted by the end of the current fiscal year, that student organizations’ money will be forfeited.

**Appeals Process**

**Denial of Funding**
In the event a club disagrees with the RSOFB’s decision to not fund a club or not fund to the level expected, clubs are able to appeal this decision. The appeal process shall be as follows:

1. Meet with the staff advisor (OSE staff member) of the RSOFB to discuss.
2. Make a formal written appeal. **MUST be made within ONE WEEK of being notified of denial of funding.**
3. Written appeal will be brought to RSOFB for a hearing and voted on.

**Suspension or Revocation of Funding**
The organization may appeal a decision to suspend or revoke a student organizations’ funding. The appeal process shall be as follows:

1. The registered student organization shall meet with the Office of Student Engagement within one week of the notice of suspension or revocation.
2. After the meeting, the Office of Student Engagement, in consultation with the Chair of Funding Board, will determine what, if any, actions can be taken for the student organization to regain eligibility for access to the funding allocation. If the registered student organization fails to correct or is incapable of correcting the violation of policy, the student organization will not receive any funding and will not be eligible to seek funding for the organization for one academic year.

**Reserve**
If clubs do not spend their entire allocation or all the money was not allocated by June 30th of each year, the money is deposited into the “Registered Student Organization Reserve.” The RSOFB decides if the money will roll over into the following year’s funding pool or if it should remain in that account.

**Policy Review**
These policies will be reviewed each spring and voted on by the RSOFB.