

Budgeting Guidelines

Intent

These guidelines were created to help fairly distribute SAC funding among SIGs. SIGs are strongly encouraged to open up events and broadly advertise them to the full FES community. SIGs should strive to host creative, inclusive, and inspiring events for the FES, Yale, and New Haven community.

Non-Speaker Events

SAC only funds non-speaker events.

Speaker SIG events are considered events in which a guest is invited to FES for a SIG event. Non-speaker events, to be funded by SAC throughout the semester through our [ad hoc request form](#), include workshops, trainings, field trips, cultural activities, and other events related to an individual SIG's mission¹.

Speaker events, or events with invited guests, are funded through a separate, single application process, that give SIGs access to funding from multiple venues: SAC, the Community Events Fund, Learning Community funding, and EQUID funding.

Funding Requirements

Each SIG must assign a Budget Office (BO) point person to manage their account. Each SIG account has a unique COA number that is used for transactions with the BO. SIG accounts must maintain a non-negative balance by the end of each semester. The BO point person for each SIG should meet with their Financial Assistant in the BO to review COA information, budget, etc.

Retroactive Funding

SAC will not retroactively fund events.

¹ Workshops and trainings led by invited guests should first go through the Speaker Event process. Funding for the event will be provided by a combination of funding sources including SAC, the Community Events Fund, Learning Community funds, and EQUID funds. SAC will fund workshops and trainings led by invited guests relevant to the SIG's mission at "confirmed speaker" rates based on the Speaker Event Guidelines.

Carryover

Money in SIG accounts does not carry over from the previous semester. Allocated money must be spent on SAC approved events within the academic year.

Restrictions²

- No meals for off-campus field trips or events will be funded.
- No printing costs or disposable decorations will be covered (i.e., posters and signage).
- Meals with World Fellows should be funded through the World Fellows Fund.
- Travel to off campus events and SIG-related activities can be subsidized.
- Movie events must have proof they have appropriate rights for public showings.
- SIGs must seek funding for employment-focused events from the Career Development Office or other sources.
- SAC does not fund conference attendance or specialized trainings.

Co-Sponsored Events

Two or more SIGs may co-sponsor an event. Only FES SIGs may co-sponsor an event. Only the main SIG sponsor will submit a request through the ad hoc request form, but will list all co-sponsoring SIGs. If funded, the main SIG sponsor will have the funds for the event transferred into their account.

Planning Ahead

SAC encourages SIGs to use and consider the [FES Events Calendar](#) when scheduling your events to avoid time conflicts. Please consider scheduling events earlier in the semester. Include event details on the Calendar to improve attendance.

Discretionary Funding

Each SIG will receive \$120 in discretionary funds per semester, which can be used at the discretion of the SIG Leaders. Balances from previous semesters will be netted against the current semester's awarded funds. Discretionary funds are not subject to budget guideline restrictions.

² Additional restrictions for invited guests for workshops and trainings can be found on the Speaker Event Guidelines.

Supplies

Supplies will be funded at SAC's discretion, based on available funds. **You must attach an itemized list of supplies to the ad hoc form.** SAC encourages the use of reused, recycled, biodegradable, and durable products. We strongly suggest not purchasing disposable plastic, styrofoam, or similar materials that persist in the environment, are toxic, or cause unreasonable environmental impact.

Equipment purchased using SAC funds should be inventoried for each SIG. Please update the [Equipment google spreadsheet](#) as you purchase equipment throughout the semester.

Arts, Music, and Creative Events

SAC will fund musicians, bands, poets or other creative speakers relevant to the SIG's mission at "confirmed speaker" rates based on the Speaker Event Guidelines. SAC will fund art projects at the "supplies" rate. SAC will fund creative events beyond these guidelines at its discretion. Art, Music, and Creative Events must conform to budget restrictions above.

Community Service

SAC encourages SIGs to consider what they can do to get involved in the community and volunteer their time and resources. SAC will fund projects at usual rates; items necessary for projects will be funded at the "supplies" rate, and travel will be funded per travel specifications below.

Fundraising

Please contact the BO while planning fundraising events to avoid complications with account balances, sales taxes, and other legal concerns.

Disclose Outside Sources of Funds

SIGs must disclose outside sources of funding, such as external donors, fundraising events or planned sales upon submission of budget requests each semester.

Expense & Event Reporting

SIG Leaders must submit their expense reports to the BO, within five business-days after the conclusion of a SAC-funded event. To make reporting easier, take a picture of receipt and send to email Nickelle Gilbert (nickelle.gilbert@yale.edu). Also submit pictures of receipts to SAC via

the [Event Report Google Form](#), which must be filled out within five business days from the conclusion of each SAC-funded event. **If a receipt or event report is not submitted within five business days of a held event, review of additional ad hoc funding for the SIG may be temporarily halted.**

Purchases and Reimbursements

Purchases can occur once ad hoc funding is approved for each event. All reimbursements require written permission from the SIG treasurer or president. Nickelle Gilbert can set up an account for you and facilitate the reimbursements. Spending and reimbursement can happen in the following ways:

- BO credit card ("P-card"). You must arrange to use the credit card in advance. You must return the credit card the same day that you sign it out. A receipt must be submitted for every purchase made within 5 business days. Failure to turn in receipts will result in funding denial for the rest of the semester until receipts are turned in. (Note: SIGs are responsible for making purchases/placing orders themselves.)
- Personal funds. You must submit your request for reimbursement with receipt copies within 5 business days of the purchase or reimbursement may not be authorized.
- Petty Cash (under \$300). Petty cash request forms are available at the BO. To get petty cash you need the COA and a written valid SIG business purpose (e.g. who, what, when, where, why and how many).
- Check requests. If submitting a check request, your social security number (SSN), the relevant receipt, and a business purpose is required.
- Travel advances. Receipts must be submitted within 5 business days of your return. If you lack sufficient documentation, reimbursement could be delayed or not authorized.

SAC Funding by Expenditure

The table below provides the funding limits for various activities. SAC will only grant funds up to the limits given.

Expenditure	Expected # of Attendees	Cost	Notes
NON-SPEAKER EVENTS			
Food	Less than 15 people	\$40	No more than \$300 total to be funded per SIG per semester
	15-30 people	\$80	
	More than 30 people	\$150	
Supplies	All	Varies - depending on type of event	Detailed breakdown of supplies required and costs should be provided. No more than No more than \$200 total to be funded per SIG per semester
Student Travel	F&ES Buses	57.5 cents/mile for SUV (\$0.575/mile), 85 cents/mile for shuttle and van (\$0.85/mile)	We encourage SIGs to hire the F&ES buses whenever possible instead of using personal vehicles.
	Personal Vehicle Use	53.5 cents/mile (\$0.535/mile)	A map showing distance traveled must be submitted to the BO with a reimbursement request. Rates are from 2017 Standard Business Travel.
	Train to/from NYC ³	\$46.00 peak / \$36.00 off-peak hours (subject to changes by MTA)	Please encourage off-peak travel when possible.

³ Updated July 2017