General Budget Information

Each semester, SIGs requesting SAC funding for the semester will submit a Budget that outlines each planned event or activity, with a brief description and itemized costs. SAC provides a budget template for this.

After a brief meeting with each SIG regarding their planned events and budgets, SAC will allocate funds and request the Business Office to disburse them to each SIG’s account.

Each SIG account has a unique number, called a PTAEO, used for transactions with the Business Office. If you do not know your PTAEO, please contact Sheila Daykin Sheila.daykin@yale.edu, Nickelle Gilbert nickelle.gilbert@yale.edu, or Jessica Foote jessica.foote@yale.edu at the Business Office.

Please direct questions or concerns to the SAC Treasurer, Kendall Barbery kendall.barbery@yale.edu and/or sac@panlists.yale.edu.

Budgeting Guidelines

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

<table>
<thead>
<tr>
<th>Expense</th>
<th># SIG Sponsors</th>
<th>Cost</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOOD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food at events</td>
<td>1</td>
<td>$45</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>$75</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>$100</td>
<td></td>
</tr>
<tr>
<td>Meal with a speaker (non-Yale faculty)</td>
<td>1</td>
<td>$150</td>
<td>Meals should be organized to enable at least 6 students to participate when 1 SIG is sponsoring.</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>$225</td>
<td>As more SIGs sponsor a meal with a speaker, additional students should be able to participate.</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>$300</td>
<td></td>
</tr>
<tr>
<td>TRAVEL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Train to/from NYC</td>
<td>-</td>
<td>$39 peak / $29.50 off-peak hours</td>
<td>Please encourage off-peak travel when possible.</td>
</tr>
<tr>
<td>Personal Vehicle Use</td>
<td>-</td>
<td>55.5 cents/mile</td>
<td>A map showing distance traveled must be submitted to the BO with a reimbursement request.</td>
</tr>
</tbody>
</table>

**Other Guidelines**

1. **Restrictions:**
   - No meals for off-campus field trips or events will be funded.
   - No honoraria for speakers.
   - No per diem for speakers, but meals with students may be funded.
   - No printing costs or disposable decorations will be covered.
   - Meals with World Fellows should be funded through the World Fellows Fund.
   - Meals with a speaker can be on or off campus.
   - “On campus” includes all Yale-owned properties.

2. **Co-Sponsored Events:** If two or more SIGs are co-sponsoring an event, please coordinate your budgets, and avoid duplicate requests. Co-sponsoring SIGs must submit the Form for Co-Sponsored Events, available on request or in the **SIG Budget Resources Google Doc Collection**. A co-sponsored event only pertains to F&ES SIGs.

3. **Travel:** Please plan ahead and book travel early to get the cheapest fare. When submitting receipts to the business office for reimbursements, please provide a map or directions showing the distance traveled. Refer to the list of preferred vendors and consult the Business Office when booking vehicle rentals for speakers.

4. **Lodging:** Please see list of preferred vendors.

5. **Planning Event Dates:** SAC encourages SIGs to use and consider the F&ES **Events Calendar** when scheduling your events to avoid time conflicts. Also, please consider events earlier in the semester, for which planning ideally would begin during the prior semester (so plan for Spring 2013 during Fall 2012, and so on).

6. **Ad Hoc Funding:** If an event is not concretely planned or confirmed when you are submitting your SIG Budget, SAC will recommend Ad Hoc funding requests once planning is finalized. Forms for Ad Hoc funding requests are available on the **SAC webpage** or in the **SIG Budget Resources Google Docs Collection**. Ad hoc funding requests must conform to budget guidelines. Requests should be submitted at least 10 days before the event.

7. **Big Ticket Funding:** For large scale events with funding requests between $1,000 and $4,000, please consider applying for Big Ticket Event funding. Big Ticket proposals do not necessarily need to conform to Budget Guidelines and will be awarded on a competitive basis. See **Application for Big Ticket Funding**.
8. **Discretionary Funding:** Each active SIG is allocated $150 in discretionary funding per semester. Balances from previous semesters will be netted against the current semester's awarded funds.

9. **Fundraising:** Please contact the Business Office while planning fundraising events to avoid complications with account balances, sales taxes, etc. Please note that selling items under $50 (per item) is non-taxable, and sales tax needs to be accounted for items above $50.

10. **Capital Expenditures and Supplies:** Will be funded at SAC’s discretion.

**Purchases**

As SIGs spend money on various events, those funds will be taken from their SIG account. Spending and reimbursement can happen in the following ways:

- **Business Office (BO) credit card.** Purchases made using the BO credit card must be accompanied by written approval from the SIG Treasurer/Leader. Please contact Nickelle Gilbert in the Business Office to coordinate. You should arrange to use the credit card in advance of the purchase, as there is only one credit card available and many people who wish to use it. You must return the credit card the same day that you take it (you cannot keep it overnight or over the weekend) and you must return the card with a receipt for every purchase made. If you fail to do so, the privilege of using the business office credit card will be revoked.

- **Using personal funds.** Purchases made using your own money can be reimbursed through the Business Office as long as you provide receipts. You must submit your request for reimbursement within 10 days of the purchase date. Late receipts will take longer to process and may not always be authorized. The following guidelines apply to reimbursements:
  - **Petty Cash (under $300).** These expenses can be reimbursed quickly, usually within 24 hours. Forms for petty cash requests are available at the Business Office. You must bring approval to be reimbursed from the SIG account from the SIG Leader or Treasurer, plus the PTAEO to charge and have a valid Business Purpose (who, what, when, where, why and how many).
  - **iexpense** – for paid Yale employees only. An iexpense account is created through Nickelle Gilbert and the reimbursement occurs with a direct deposit to your bank account.
  - **Check requests:** For non-paid Yale employees (including students). These require written permission from the SIG treasurer or president, your social security number (SSN), the relevant receipt, and a business purpose. Nickelle Gilbert can set up an account for you and facilitate the reimbursements.
Travel advances. Receipts to clear travel advances need to be submitted within 10 days of your return.

Please note that lack of adequate documentation may mean that reimbursements are put on hold for up to 2-3 weeks.

Preferred Vendors

Yale University Buyer’s Guide has a list of “preferred vendors” at: http://buying-guide.yale.edu/
You can use drop-down menu for categories like “Hotels – New Haven area”, “Business Meals” etc. to see the list of preferred vendors for that category, and call them for a price quote. Please note however that the institution listed there may not necessarily be the most cost-effective and running your choice by the Business Office may be helpful.

Reporting

1. Each SIG must submit a brief Report of their activities and funds spent over the course of the semester. The Report must contain:
   - All events for which SAC granted funds. Identify events that did not take place;
   - Actual expenditures on the items listed in the original budget (e.g. food, travel, etc.);
   - Approximate number of attendees at each event;
   - Account balance;
   - 5-10 best photos from events.

2. Reports for Fall semester are due to SAC by February 1st. Spring semester paperwork is due May 15th.

3. SAC encourages SIGs to build SIG institutional memory to make planning events easier and to build SIG traditions. SAC recommends that SIGs keep descriptions of how events were organized (e.g. what kind of events require custodial help and how to get it, which caterers were used and are recommended, what budgets in prior years looked like, etc.). Pass this along to incoming SIG leaders.

Please direct questions or concerns to the SAC Treasurer, Kendall Barbery kendall.barbery@yale.edu and/or sac@panlists.yale.edu.