

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.

Budgeting Requirements

SIGs must submit a budget each semester that outlines each of their events with a description and cost. SAC will meet with each SIG during Budget Hearings to discuss their budget, then allocate some or all of the funds to the SIG through the Budget Office (BO). Each SIG must assign a BO point person to manage their account. Each SIG account has a unique PTAE0 number that is used for transactions with the BO. SIG accounts must maintain a non-negative balance.

Discretionary Funding

Each SIG will receive \$250 in discretionary funds per semester, which can be used at the discretion of the SIG Leaders. Events taking place before the semester's Budget Hearing should be placed on the previous semester's budget unless the SIG elects to use discretionary funds for that event.

Retroactive Funding

SAC will not retroactively fund events.

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.

Restrictions

- No meals for off-campus field trips or events will be funded.
- No honoraria or compensation for speakers.
- No per diem for speakers
- 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. Please coordinate your budgets to only submit one funding request. All co-sponsoring SIGs must put the event on their budget request form, but only one SIG needs to fill out the costs or event details.

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. **Speakers must be confirmed before SAC will give out funding.** SIGs submitting unconfirmed speaker events will be encouraged and assisted in applying for ad hoc funding once the speaker is confirmed.

Ad Hoc Funding

If an event is unconfirmed when you are submitting your SIG Budget, SAC recommends submitting an [Ad Hoc funding request](#) once planning is finalized. Ad hoc funding requests must conform to budget guidelines. Requests must be submitted no less than **5 business days before** the event.

Big Ticket Funding

A [Big Ticket Event funding request](#) is intended for events with planned budgets between \$1,000 and \$4,000. Big Ticket proposals do not need to conform to Budget Guidelines and will be awarded twice per semester on a competitive basis between SIGs. Funding requests for recurring conferences should be sent to conference funding.

Conference Funding

Conference funding is intended for events with planned budgets from \$1,000 to \$4,000 that have already happened at least once. The application for conference funding will be available on SAC's website. Available funds will be allocated fairly and consistently across events with demonstrated support by SAC to increase the reliability of SAC funding for conferences.

Discretionary Funding

Each active SIG is allocated \$250 in discretionary funding per semester. Balances from previous semesters will be netted against the current semester's awarded funds.

Supplies

SAC will fund 50% of supplies requested at SAC's discretion, based on available funds. You must include an itemized list of supplies. 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.

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. 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.

Fundraising

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

Reporting

SIG Leaders must submit their expense reports to the BO. **If a receipt is not submitted within five business days of a held event, that SIG receives no funding for the next semester.** Funding may be reinstated at SAC's discretion. To make reporting easier, take a picture of receipt and send to email Nickelle Gilbert (nickelle.gilbert@yale.edu) and copy the SAC Treasurer Matthew Moroney (matthew.moroney@yale.edu). At the conclusion of each SAC-funded event, SIG leaders must submit the [SIG Event Report](#).

Purchases and Reimbursements

Purchases can occur once the SIG's budget is approved after their budget hearing. 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. 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 subsequent semester.
- 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 PTAE0 and a written valid SIG business purpose (e.g. who, what, when, where, why and how many).
- Iexpense. Yale employees can use their Iexpense accounts with the help of Nickelle Gilbert of the BO.

- 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.

Lodging and Travel

Use the [Yale University Buyer's Guide](#) for the list of preferred vendors. You can use the 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 that the institution listed there isn’t necessarily the most cost-effective. Plan ahead and book travel early to get the cheapest fare. When submitting receipts to the BO for reimbursements, please provide a map or directions showing the distance traveled. Refer to the list of preferred vendors and consult the BO when booking vehicle or hotel rentals for speakers. SIG group travel will be subsidized at the rates listed in the “SAC Funding by Expenditure” table.

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	# SIG Sponsors	Cost	Notes
FOOD			
Non-Speaker Event	N/A	\$50	Initial budget request limit of 5 per semester. Additional events can be requested on an ad-hoc basis.
Events with a Confirmed Speaker ¹	1	\$75	
	2	\$100	
	3	\$130	
Meal with a Confirmed Speaker	1	\$150	Meals should accommodate at least 6 students
	2	\$225	Meals should accommodate at least 8 students
		\$300	Meals should accommodate at least 12 students
TRAVEL & LODGING			

¹ Confirmed speakers are defined as researchers, practitioners, recognized experts, artists or musicians that are relevant to the SIG. Speakers cannot be members of the SIG.

Train to/from NYC (Updated July 2017)		\$46.00 peak / \$36.00 off- peak hours (subject to changes by MTA)	Please encourage off-peak travel when possible.
One Night Accommodation (For Speakers Only)		\$200	Yale recommended hotels
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.
Airfare, Train, Bus (For Speakers Only)		Red: \$100 Blue: \$200 Yellow: \$250 Green: \$300 Purple: \$400	See map below for zone colors. Provide estimate of actual cost in budget. Regions not depicted or additional airfare costs may be funded on a case by case basis.
Taxi or Rideshare (For Speakers Only)		As necessary	Taxis and other transportation costs may be funded from a SIGs discretionary budget. SAC will consider funding taxi rides from local train and airport stations. Bicycle use is strongly encouraged.

United States of America

