

ORGANIZATION BUDGET ALLOCATION PROCESS - IMPORTANT INFORMATION



2024-2025

GENERAL TIMELINE

- Quarter 1:
 - First day of fall semester through last day of Fall Break
 - Requests for Q1 spending/events must be submitted by the deadline in Q4
- Quarter 2:
 - First academic day following Fall break through Last day of Fall semester
 - Requests for Q2 spending/events must be submitted by the deadline in Q1
- Quarter 3:
 - First day of Spring semester through last day of spring break
 - Requests for Q3 spending/events must be submitted by the deadline in Q2
- Quarter 4:
 - First day following spring break through last day of classes spring semester
 - Requests for Q4 spending/events(including summer conferences/competitions) must be submitted by the deadline in Q3

- Only members who attend the mandatory information session (and whose attendance can be verified by SLD) within the corresponding fiscal year are authorized to submit a budget request for the organization
- RSO will submit requests via TribeLink by the appropriate deadline; no late submissions will be accepted
 - Requests must be complete and accurate
 - Requests must be submitted as a line-item budget, not a lump-sum budget
- OBAC will review requests during weekly meetings as they are submitted
- Organizations may request to meet with OBAC
- OBAC will deliberate and make a decision
 - Approve; Defer; Partially Defer; Request Revision/Re-submission; Deny
- RSO will be notified and the allocation will be loaded in Tribelink by the last day of the quarter, pending completion of required training
- RSO will work with SLD to navigate compliant purchases/payments

KEY STEPS OF THE PROCESS

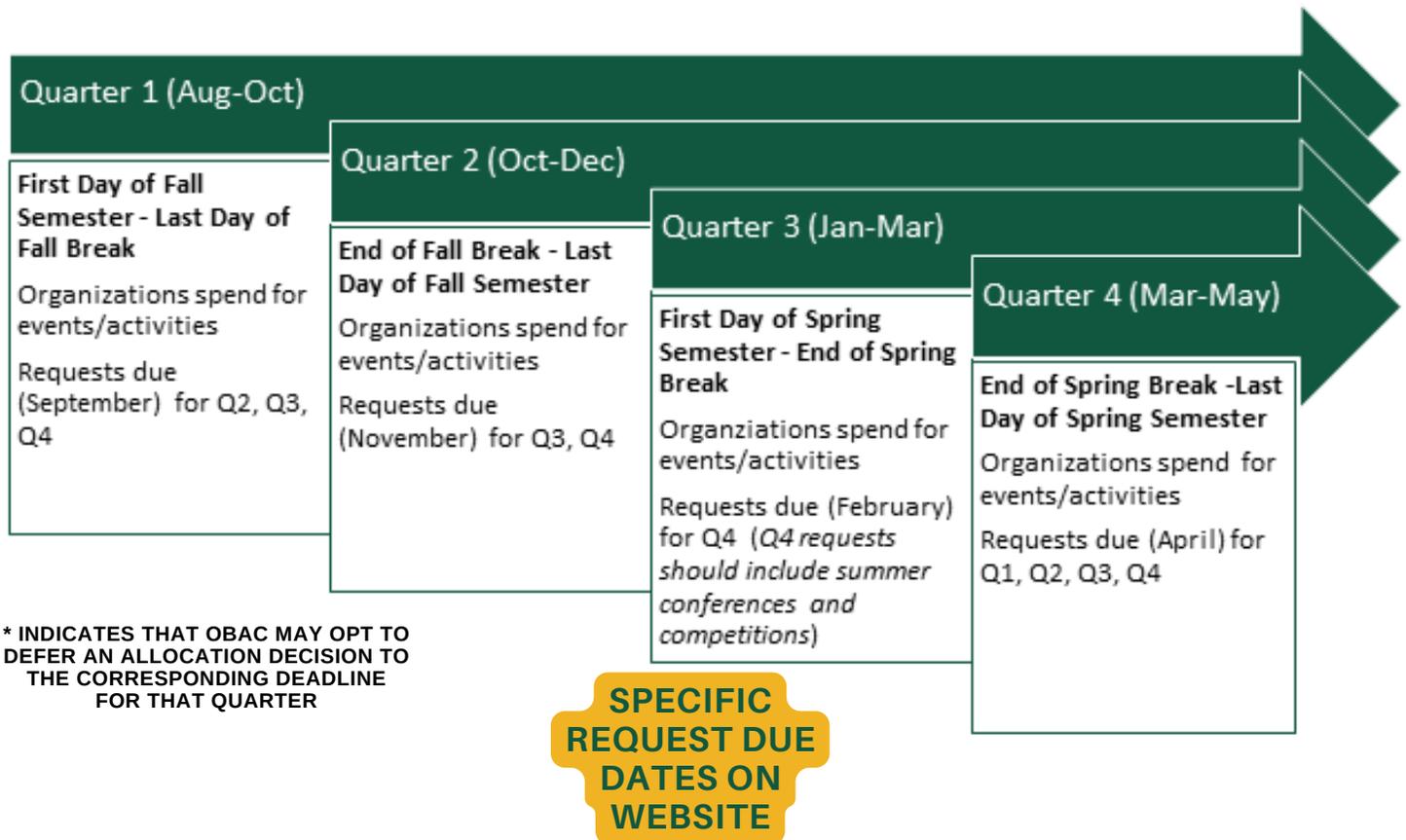
EXPECTATIONS FOR ORGANIZATIONS

- Organizations will promote all funded events in TribeLink.
- Organizations must track event attendance in TribeLink.
- Organizations must submit an after action report to OBAC on all funded events and conferences.
- Failure to comply with expectations and follow up procedures may impact OBAC decisions on future funding requests for organizations. Additionally, over-inflation of anticipated attendance for food at events may impact OBAC decisions on future requests for food.
- Organizations agree to comply with policies/procedures set by the university, Student Assembly, and Student Leadership Development.
- Organizations may not purchase or make payments and seek reimbursement after the fact.
- Participate in any training requirements specified by Student Assembly.

- Guidelines are not representative of guaranteed funding by OBAC; just because it *can* be funded, doesn't mean it *will* be funded.
- Organizations are encouraged to secure additional funding sources for events and activities.
- Student organizations should not rely solely on allocations from the Organization Budget Allocation Committee to fund their operations, events, and activities.
- The committee reserves the right to give priority consideration to programmatic events/activities that serve the broadest range of the W&M community.
- Unused funds will be returned to Student Activities Fee Reserves at the end of the fiscal year.

PLEASE KEEP IN MIND

ORGANIZATION BUDGET ALLOCATION PROCESS - TIMELINE



NOTES AND QUESTIONS

ORGANIZATION BUDGET ALLOCATION PROCESS - GUIDELINES

APPROVED EXPENSES

- Operational supplies/expenses, such as office supplies and printing services. This may include organizational membership fees to affiliate with a broader association, for example a W&M chapter's membership fees to a national organization;
- Equipment integral for general operations that can be retained by the organization over multiple years, such as banner/tablecloth, mission/purpose aligned equipment, and costumes/uniforms;
- Costumes and uniforms are defined as integral if they must be worn for specific events (competitions and performances);
- Speakers and Performers, will be required to comply with all university contracting/procurement requirements. William & Mary affiliated individuals (faculty/staff/students) may not be contracted/paid through the OBAC funding process;
- Giveaway items that are intended to promote an educational purpose for the broader campus community, so long as these items do not promote specific events or are branded solely for promotion of the organization itself. Additionally, items must be intended for broad distribution, and not for members only;
- Event expenses including reservations/rentals, event supplies/decorations, promotion/advertising, and event support services. All event expenses should have a defined purpose and clear alignment with the purpose of the event;
- Travel expenses for organizations limited to transportation and conference/competition registration fees;
- Food, under the following conditions and guidelines (see below). The funding of food will be approved under a stringent review process and is not intended to be provided at all SA-funded events. OBAC shall give priority consideration to "reception" style events where a taste (not a meal) is the funding request. OBAC will deny funding requests for food where the sole purpose of the food is to be used as an attendance incentive.

- Food expenses for events and receptions may not be full meals; for any events where food is funded, organizations will be required to track attendance and submit the attendee list to the OBAC;
- Cultural Event - a maximum of \$5/person of anticipated attendance; education and exploration of culture must be the primary focus of the event and the inclusion of food must enhance the educational/exploration experience;
- Speaker/Performer Reception - a maximum of \$3/person of anticipated attendance; receptions are held following an external speaking/performer engagement to promote further engagement and discussion immediately following the event;
- Non-Cultural Event - a maximum of \$3/person of anticipated attendance; non-cultural events where food is an allowable expense include organization training/development events that are open to the entire organization or organization sponsored events that are open to the entire campus where food would enhance the development of the community. This does not include internal social events or regular meetings;
- Meal expenses for invited speakers/performers/judges - maximum amounts of funding allocated will follow university per diem guidelines;
- Hospitality table food, not to exceed \$50, may be funded for organization sponsored events exceeding 5 hours; food will be available to organization members staffing the management/execution of the event;
- Interest meetings - a maximum of \$50 per request and no more than once a semester for a total of two times maximum each academic year; interest meetings should be held within the first 30 days of each semester and the purpose must be to recruit new members;
- Food that may not be funded includes meals for individual members and food for regular organization meetings;

ADDITIONAL FUNDING GUIDELINES FOR FOOD EXPENSES

ORGANIZATION BUDGET ALLOCATION PROCESS - GUIDELINES

LIMITATIONS

- Fundraising activities may be funded, only if the purpose of the fundraiser is to support continuing organization operations or future campus/organization programming; the funding of fundraisers where the proceeds will be donated to external charitable organizations shall be prohibited;
- Ticket or admission revenue shall be applied to help the organization offset the cost of the event being funded;
- The OBAC reserves the right to limit food funding requests from student organizations to a maximum of 2 events each semester, excluding interest meetings;
- Direct travel or use of university vehicles for student organizations may be funded. However, meals for travelers and lodging will not be funded. Additionally, international travel may be funded, only under the conditions outlined in the International Travel policy, as provided by the university;
- Equipment expenses may be limited to one-time purchases (minimum of three years) unless special circumstances exist as approved by OBAC;
- Payment for DJ services shall be limited to a maximum amount consistent with the rates agreed upon between the university and the contracted provider;
- Conference spending is limited to one conference per semester and one during the summer;
- Print shop orders and copy code charges for event publicity shall be limited to a maximum of \$20/event and \$10/interest meeting

- Awards and Honorariums will not be funded, such as plaques, trophies, certificates, gift certificates, scholarships, or cash prizes;
- No internal/private social and/or celebration activities will be funded, such as formals, award ceremonies, initiations, or senior send-offs. Private events shall be defined as members plus invited guests;
- Operational expenses that may not be funded include software, subscriptions, websites including domains and hosting fees, and membership fees for individual people;
- Individual admissions tickets/entrance fees;
- Political or partisan activities in support of or opposition to a candidate or political party;
- Purchases solely for the purposes of religious worship or devotion;
- Activities for which academic credit is received;
- Alcohol or tobacco, or other similar/related substances;
- Memorabilia, yearbooks, photo albums, or other organization branded/customized paraphernalia;
- Salaries or wages;
- Apparel for members of the organization, where apparel is defined as articles of clothing/accessories that can be worn beyond a specific purpose, such as a performance/competition costume or uniform;
- Single-use plastics;
- Printing with no clearly specified purpose;
- Financial penalties, such as but not limited to late fees, expedited shipping, damages, and cancellation;
- Parking or transportation fees that require reimbursement;
- Any other items/services prohibited by university policy or local, state, or federal law.

RESTRICTIONS/PROHIBITED EXPENSES

PURPOSE OF THE ORGANIZATION BUDGET ALLOCATION PROCESS

To support the activities and initiatives of Recognized Student Organizations which contribute to community development, diversified experiences, and enhance student life.

QUESTIONS? EMAIL SAFINANCE@WM.EDU