



1 **THE RENSSELAER UNION**

2 **2016-2018 BUDGETING GUIDELINES AND PROCEDURES**

3 These guidelines have been developed to help clubs in the entire budgeting process. In reading and adhering
4 to these guidelines, you agree to follow all policies, guidelines, and procedures as found in the *Rensselaer*
5 *Union Budgeting Guidelines and Procedures*. It is important to note that the Union Executive Board (E-
6 Board) may choose to deal with club(s) in a manner not specifically stated in these documents on a case-by-
7 case basis.

8
9 From the Rensselaer Union Constitution: “The purpose of this Union shall be to unite all its members in a
10 commitment to the ideals for which Rensselaer stands, to expand the extracurricular life at Rensselaer, to
11 coordinate all student organizations, to act as a medium through which student opinion may be expressed,
12 and to work with all other members of the Rensselaer community to encourage student initiative and to lead
13 student action in all interests which will serve the welfare and betterment of Rensselaer.”

14
15 The budgeting guidelines are reviewed each year by the E-Board and are approved at least once every two
16 years. This document shall be used in the course of budget preparation and approvals and the monitoring of
17 the appropriated funds for all **Union Funded Clubs**. This document will go into effect for the remainder of
18 Fiscal year 2016 and Fiscal Years 2017 and 2018 (November 2015- June 2016, July 2016 - June 2017, and
19 July 2017 - June 2018) budget-related activities. It shall be used in the development and approval of all
20 proposed and final budgets for FY '17 and FY '18. Addenda may be added to these policies with majority
21 approval of the E-Board, and Union clubs and organizations will be notified immediately of such change(s).

22 **SECTION I: STUDENT ACTIVITY RESOURCES TO HELP**
23 **CLUBS AND ORGANIZATIONS**

24 ***E-Board Representatives*** - The President of the Union assigns an E-Board Representative to each club. Each
25 E-Board Representative represents several Union clubs. E-Board Representatives are available to help their
26 clubs with issues relating to their budgets and programs, and are the official liaison of the club to the E-
27 Board throughout the fiscal year including throughout the budgeting process. E-Board Representatives are
28 simultaneously responsible to two constituencies: they have the responsibility of representing each of their
29 clubs' interests to the E-Board, while at the same time representing the interests of all the students in the
30 Union.

31
32 ***Student Activities Resource Staff*** - Each club is assigned a specific '**Student Activities Resource Person**'
33 (**SARP**) who is knowledgeable about the issues relating to the club's specific activities, and who serves as a
34 resource provider for the club. SARPs do not have discretionary authority over club budgets. Signatures of
35 SARPs on documents indicate only that the issue in question is consistent with said policy and do not
36 endorse a particular program unless specifically stated, although the signature of a SARP is required on
37 Union proposals and requisitions. Students are not authorized to sign binding agreements or contracts for
38 their organizations or for Rensselaer.



1 **SECTION II: FUNDED CLUBS AND THEIR PRIVILEGES AND OBLIGATIONS**

2 The Executive Board is the budgeting group of the Union, and fulfills its obligation “to coordinate all student
3 organizations” by categorizing all student clubs and organizations as they relate to the Rensselaer Union. A
4 club is categorized as a **Union Recognized Club** when it has been recognized by the Executive Board
5 through the Club Affiliation/Recognition Procedure. A Union Recognized Club is categorized as a **Union**
6 **Funded Club** when it receives Union funds through the budgeting process or an Executive Board proposal.
7 . Union club recognition comes with certain responsibilities and privileges established in the Club
8 Classification Policy and this document to hold clubs responsible to the activity fee paying student body.

9
10 **A. MEMBERSHIP**

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12 According to Article II of the *Rensselaer Union Constitution*, only currently registered RPI students who
13 have paid an activity fee shall constitute the membership of the Union. The participation of persons who are
14 not RPI students may be valid if the person adds value to the club through their participation. The
15 determination is initially that of the club and ultimately that of the E-Board. Those not affiliated with RPI as
16 students or their spouse or legal dependent, faculty, staff, alumni, or students of Hudson-Mohawk
17 Consortium schools currently enrolled in courses at Rensselaer may not comprise more than 5% of the
18 membership of any Rensselaer Union club without specific approval of the E-Board. For more information,
19 refer to individual club constitutions or the *Starter Constitution* for all definitions on membership affiliations.
20 Clubs must update their membership lists before submitting a budget for the next fiscal year.

21
22 **B. LIABILITY AND PROGRAM APPROVAL**

23
24 Rensselaer Polytechnic Institute may assume liability for all activities of the Institute. Rensselaer and the E-
25 Board must determine in its view whether or not the scope of any proposed club or specific club program
26 presents an abnormal risk to the students involved in the activity, to the Union as a whole, to the Institute or
27 to the Rensselaer Community at large. It may need to consult recognized experts in determining the level of
28 risk.

29
30 Because of its responsibility to the Institute, the Union policy mandates that all activities of **Union Funded**
31 **Clubs** be approved in advance. Written approval must be obtained prior to any **Union Funded Club** activity,
32 through either an approved budget or an E-Board Proposal for a new program, whether or not the activity is
33 subsidized by the Union. This approval process also extends to any related activity that members of a club
34 would like to do outside the club’s approved budget, so that even if the club does not receive funding for the
35 activity the members will be covered in the event of an accident related to the activity. The Institute will not
36 cover liability resulting from an unapproved program. Instead, the student members of the club responsible
37 for the activity will be held personally liable.

38
39 **C. CLUB OBLIGATIONS**

40
41 All Rensselaer union funded clubs and organizations that operate using the Activity Fee must be held
42 accountable to the student body. Clubs are expected to uphold their obligations by meeting the following
43 requirements:

- 44 1. Clubs must be represented at the activities fair.
45 2. Clubs must update officer list, first contact and membership list on Club Management System
46 (CMS) at the beginning of each semester.



3. Clubs must have a representative attend the club officer's financial workshop. For clubs that travel for programs, a representative of the Club must attend the travel workshop. Additionally, if a club wants to use vans, a 21+ year old representative must attend the travel workshop.
4. Clubs must meet with their E-Board Representatives before submitting their final budget.
5. Clubs must submit a final budget for approval by the E-Board.

Failure to meet these obligations may incur a loss of subsidy or placement on probationary status as outlined in the *Club Sunsetting Policy*.

SECTION III: BUDGETING AND PROCEDURAL GUIDELINES

Every December, each **Union Funded Club** or a **Union Recognized Club** that is seeking funding must propose a budget for its activities for the next fiscal year by specifically stating what its expenses and income are for each integral part of their programs. Funds may be spent and/or collected only as provided for in the approved club budget and the *Rensselaer Union Budgeting Guidelines and Procedures*. Club budgets expire at the end of Spring semester (May) of the approved budget year unless an exception is granted by the Union. Clubs and their officers are accountable for implementation of these policies and their budgets. These and all other relevant policies will be distributed to all officers who are authorized by the club to make expenditures. Upon being elected and by submitting an officer list, all officers agree to accept ownership of these policies and of the responsibility to implement them with respect to their budget.

Club budgets are an expense line under the Rensselaer Union Budget and depending on fiscal conditions can be adjusted at any time during the fiscal year. Each club is to use their budget subsidy as prescribed in the approved budget programs. No club is to exceed the approved budget. If the club's account is at or near budget, it may be frozen by the E-Board to prevent further expenditure. A '**Club Subsidy**' is defined as expenses minus income; the actual subsidy will change over the course of the year for each club relative to the income it raises and the expenses it incurs. Clubs should adjust their programming accordingly over the course of the year so that they don't go over their original budgeted subsidy. In no event, except with prior E-Board approval, will the overall club subsidy be in excess of what is granted to the club through the annual budget approval process.

Approval for funding, or the fact that a club or organization has received funding in the past for any specific program, does not guarantee that a program will continue to receive Union funding. The Union will not subsidize any religious or political organization or group which claims affiliation with such an organization, nor will it fund any organization or event for a particular political or religious viewpoint. The Union will not subsidize charitable events or organizations whose primary purpose is fundraising for philanthropic purposes. This does not necessarily include events which are open to the entire campus and tangentially raise funds for philanthropic purposes. The Union will not fund any organizations which prohibit membership of an Activity Fee paying student. This does not include Club sports or Student Government bodies provided membership is only restricted based on guidelines approved by the Executive Board.

A. BUDGETED INCOME, DUES, AND FUNDRAISING

The Union does not fully subsidize all program expenses. Unsubsidized expenses must have an accompanying income line in the budget to meet this difference. This income can be generated from dues, fees for services, fundraising, or personal contributions.



- 1 1. Clubs that are required or choose to collect dues must collect at least the dollar amount per
2 person specified in their budget as approved by the E-Board.
- 3
- 4 2. Clubs that collect dues shall collect at least 50% more from members who do not pay an activity
5 fee such as visiting scholars, students from other colleges, faculty and staff. This does not apply
6 to legal dependents of activity-fee-paying persons.
- 7
- 8 3. Clubs authorized to charge fees for their services must adhere to rates set by the E-Board in their
9 budget.
- 10
- 11 4. Clubs may fundraise to meet their program expenses. Any fundraising initiative requiring
12 subsidy must be approved in advance, either through the budgeting process or by an E-Board
13 Proposal. To conduct fundraising, clubs must state why and how they intend to raise the money,
14 and how much they expect to raise. Any associated costs from the fundraiser must be entirely
15 covered by the income. Any remaining money raised can be donated or used towards other club
16 programs. Approval is based on whether the fundraising is consistent with Rensselaer community
17 standards, whether it violates any known local, state or federal laws, and whether it is in the
18 “spirit of Rensselaer.” Fundraising initiatives will be approved using the following guidelines. If
19 a club would like to conduct additional fundraising outside of their approved budget for the
20 current fiscal year, they must submit a separate E-Board proposal.
- 21
- 22 5. **It is an RPI policy that external bank accounts for club use are not permitted in the name**
23 **of a club officer or the club itself. No club is to obtain a federal ID number of its own or use**
24 **RPI’s federal ID number. Violation of this policy will be handled by the Dean of Students**
25 **and RPI’s Vice President for Finance and may result in loss of subsidy.**

26 **B. BUDGETED EXPENSES**

27 Budgeted expenses are those expenses that are eligible for and have been approved for funding by
28 the E-Board during budgeting. Prior to actually purchasing the items, new bids and quotes must be
29 obtained as provided throughout this section. The Union will not subsidize (a) “personal tangible
30 items” including, but not limited to, food, lodging, uniforms, t-shirts, and personal items; and (b)
31 cases where the level of individual personal enrichment surpasses the benefits to those of the rest of
32 the club or organization, or of the other members of the Union, except as provided for below. The E-
33 Board has the ability to make exceptions for all budgeting policies mentioned below, provided
34 substantial reasoning is given.

35 **1. Food, Reception, and Work Food Funds**

- 36 **a.** The amount of subsidy for receptions will not exceed \$2.50[†] per activity fee paying club
37 member per semester. Reception Funds are intended to be used throughout the semester at
38 the club’s discretion. It is recommended they be used for recruitment and end of year
39 receptions. Reception funding is only to be used for events where all club members are
40 invited to attend and a plan for its use should be included in the budget request for Reception
41 Funds.
42 Funds.
43 Funds.
44



- b. The Executive Board may choose to subsidize food for specific events that are a service to the club and that require a substantial amount of work. Work Food Funds shall not exceed \$3.00[†] per activity fee paying participant per event.
- c. The Executive Board may choose to subsidize food for specific events where food is an integral part of the event's or club's purpose.
- d. Other programs involving food in the budget must also include an appropriate income line to cover the cost of the food.
- e. No individual meals will be subsidized. Examples of this would be food over the course of a budgeted trip or an "away" competition in which the club participates.

2. Lodging

When a club is required to stay overnight for an event in which the members are competing or representing Rensselaer, the cost of lodging will be subsidized for each gender. The maximum price that the Union will subsidize for lodging is \$100[†] for rural trips and \$150[†] for urban trips per room per night. Clubs are expected to budget based on a maximum of **3 people per room**.

3. Programs Involving Travel

The E-Board of the Union may subsidize travel for organized instruction, competition, entertainment and recreation, in the name of Rensselaer or in service to the Union, according to each club's purpose and goals. Anything stated herein does not guarantee E-Board approval of a proposed program involving travel.

- a. The Union will subsidize transportation at the rate of \$.25[†] per mile per vehicle, or by actual gas receipts and toll costs, whenever personal cars are the E-Board-approved method of transportation for a program. The Union can subsidize the cost to rent vans or buses. The maximum price that the Union will subsidize for van rentals is \$65[†] for one day trips and \$155[†] for weekend trips.
- b. The Union promotes other modes of transportation (besides personal car) that may be safer and more economical. Groups traveling distances should consider renting a van to avoid potential personal liability. If there are more than four people going on the trip, it is recommended they go by seven-passenger rental van. All drivers must take the RPI risk management defensive driving course before they can drive the van. If there are more than 30 people, it is recommended they travel by chartered bus. Students should realize that anytime a personal vehicle is used, in NYS, the insurance policy of the owner of the car is the primary policy for all accident/damage claims.
- c. The Union must approve any club-sponsored trip in advance, and will set the appropriate subsidy level, if any, for that event(s).
- d. For approved trips, each participating club member will pay an individual "trip fee" which, combined, will account for at least 60% of the total trip cost. Trip fees = Total trip expense



1 (lodging, registration fees, gas & tolls, transportation, any other associated fees excluding
2 meals) x 60% divided by the total number of club members traveling.

- 3
- 4 e. If a club has won the right to participate in a local, regional or national event(s) that is not in
5 their budget, after approval of the program by the E-Board by proposal, the Union may
6 subsidize up to 70% of the cost of all expenses associated with the event(s) excluding meals,
7 but not to exceed \$4000[†]. In the event that both men’s and women’s teams qualify, then the
8 total subsidy must be split equally between the two.
- 9
- 10 f. If a club is invited to compete or perform in an “Invitational” event(s) that is not in their
11 budget, after approval of the program by the E-Board by proposal the Union may subsidize
12 up to 40% of the cost of all expenses associated with the event(s), excluding meals, but not to
13 exceed \$2000[†]. In the event that both men’s and women’s teams qualify, then the total
14 subsidy must be split equally between the two.
- 15
- 16 g. If there are direct expenses for travel, uniforms, or other expenses deemed necessary for a
17 non-RPI individual’s participation, the expenses will not be subsidized by the student activity
18 fee or other income budgeted by the E-Board.

19

20 **4. Uniforms/T-Shirts/Personal Items**

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22 Clubs may choose to take advantage of the purchasing power of the Union to acquire uniforms, t-
23 shirts and personal items related to their club’s activities, whether they are approved budget items
24 or not. In any event, as approved budget items or not, the design of all uniforms, t-shirts and
25 personal items must be consistent with Rensselaer Community standards, must not violate any
26 known local, state or national laws, and must be in the “spirit of Rensselaer.”

27

- 28 a. The Union may subsidize uniforms, t-shirts or other approved items that have a lifetime of
29 less than 1 year or remain the property of the club/team.
- 30
- 31 b. The Union will not fund uniforms, t-shirts or personal items that become the property of the
32 individual members of the team/club or are customer-tailored or purchased to individual
33 specifications.
- 34
- 35 c. In most cases, clubs will be required to take advanced orders and collect funds up front
36 before a payment will be processed on all t-shirts and memorabilia for club functions.
- 37
- 38 d. Prizes and trophies won in club-sponsored events hosted by Union clubs must be covered by
39 entry-fees for said event.

40 **5. Referees/Coaches/Instructors**

41

- 42 a. Instructors/Coaches may be subsidized up to 50% of the cost of the coach’s compensation
43 that includes salary plus fringe. Club dues must offset at least 50% of a coach’s salary plus
44 fringe benefits.
- 45



- b. Coaches should not be given salary or benefit increases in club budgeting. Any changes made to these items will be discussed by the E-Board during general budgeting.
- c. Funds allocated for coaches, instructors, or referees cannot be transferred to other programs or vice versa.
- d. The Union may subsidize the cost of officials necessary to conduct valid competition. Any student may be paid for his or her services in this capacity.

6. Charitable and Philanthropic Events

The intent of the Student Activity Fee is to enrich student life on campus and not be a direct or indirect donation to charity or other philanthropy.

- a. The Executive Board may choose to subsidize philanthropic or charitable events if the event provides substantial benefit to campus, student life, or student development. The philanthropic or charitable event must be accessible to all students and predominantly focus on students (e.g. spread awareness or entertain).
- b. Events requiring mandatory donations, such as entrance fees, will not be subsidized. An entrance fee that is used exclusively to offset the cost of the event is not considered a mandatory donation.
- c. If an event raises more from its entrance fee than was budgeted, that extra money is not eligible for donation.

Note that compliance with the above does not guarantee funding for a program, but only enables it for consideration.

7. Affiliations

- a. The Union may subsidize up to 100% of the cost of organizational membership fees for clubs in national organizations or affiliations that the E-Board approves.
- b. Any club that has national dues to an outside organization must have club membership dues that are accurately proportioned to offset the cost of unsubsidized national dues.
- c. Club members' individual membership fees in applicable national organizations may be subsidized at a rate of up to 40%. The remaining fees should be covered by club membership dues.

8. Club Services and Miscellaneous Expenses

- a. **Polytechnic Advertising** - Polytechnic advertising is approved through the budgeting process by the E-Board, but is allocated as Poly Credits, which are equal to 1/8 of a page.



1 The E-Board will evaluate each request and determine how much space they will be able to
2 approve for allocation. The use of Poly Credits is contingent on space availability in the
3 Polytechnic. Allocations will not be made for announcing club meetings as Poly Credits
4 should be used for special events.
5

6 **b. UPAC Sound and Lights** - Union Funded Clubs are not required to pay the rental fee on
7 equipment but are required to pay technician fees for the students who work the event at \$10[†]
8 per hour per student worker.
9

10 **c. Public Safety** - Some events may require Public Safety for crowd control and/or liability
11 purposes. The Union's staff evaluates each program to determine if their services will be
12 required.
13

14 **9. Club Materials**

15 **a.** The Union will subsidize a maximum of 250[†] copies for general club advertisement
16
17

18 **b.** All club belongings, including generic supplies or materials, must be documented and
19 accounted for in club inventory. The inventory must include the type of item (or type of
20 group of items), its dollar value to replace, and number of those items. Any item that is
21 integral to club operations or has a value greater than \$100[†] must be individually inventoried.
22

23 **10. Reserve Accounts**

24 **a.** In the cases where large one-time or infrequent but recurring purchases are required, clubs
25 may and are encouraged to request Reserve Accounts to save portions of the expense every
26 year for a number of years leading up to the purchase.
27

28 **b.** Reserve Accounts may only be established for a single purpose unless an exemption is
29 granted by the Executive Board. A club may establish and maintain several Reserve
30 Accounts.
31

32 **c.** The budget lines for Reserve Accounts shall list the amount to be saved each year, over how
33 many years money is to be saved in the account, what year the account is currently in, and
34 how much money has been saved in the account to date.
35
36

37 **11. Conflict of Interest**

38 There is a "conflict of interest" policy of Rensselaer Polytechnic Institute's Purchasing
39 Department that concerns the purchase of goods and services. Goods and services provided by
40 Rensselaer employees, students or independent contractors affiliated with the Rensselaer Union
41 shall not be considered a conflict of interest if they are in compliance with the Institute's Policy.
42 The Business Administrator of the Rensselaer Union will monitor this. For more information on
43 policies see Rensselaer Purchasing Department policy #1.3.
44
45
46

47 [†] Numbers updated yearly, can be modified at any point prior to budgeting in December



INCOME/EXPENSE CHART AND CODES USED IN BUDGETING

1			
2			
3	001	Office Supplies	pens, paper, file folders, etc.
4	005	Uniforms	uniforms, t-shirts, etc.
5	006	Non-Capital Equipment	equipment purchases under \$5000
6	007	Computer Software	software, upgrades, etc.
7	008	Computer Supplies	computer supplies other than software or repairs
8	009	Miscellaneous Supplies	
9	021	Advertising	forms of Media other than the Polytechnic
10	022	Postage	mailing letters through USPS
11	031	Food Service	on-campus food purchases through Sodexo
12	038	Photocopies	copies made on Union copiers
13	039	Laundry Services	cleaning uniforms, etc.
14	040	Printing	printing or copies from an off-campus vendor
15	043	Equipment Repair	repair costs for broken equipment
16	047	Other Service Fees	coaches, referees, performers, etc.
17	089	Membership Fees	membership or registration fees
18	099	Awards and Prizes	purchasing awards and prizes for tournaments or contests
19	1051	Cell Phone	cell phone monthly service fees
20	111	Travel	gas, tolls, hotel, vehicle rental, food while traveling, etc.
21	114	Food Service	off-campus local food purchases
22	175	Capital Equipment	equipment purchases over \$5000
23	176	Capital Computer Equipment	computer equipment purchases over \$5000
24	212	Exempt Part-Time Salary	use for music directors
25	213	Supplemental Salary	use for additional payments to regular RPI employees
26	222	Part-Time Non-Exempt Salary	
27	224B	Overtime Pay	use for Athletic Department Staff overtime
28	230	Benefits	30.2% of salary
29	557	Transfers	use for transfers to reserve accounts or other departments
30	564	Transfers	use for UPAC Lights and Sound
31	L11	General Books	purchases of general books
32	L12	Reference Books	purchases of reference books
33	L39	Journal Replacements	use for magazine subscriptions
34	PC	Poly Credits	used for advertising in the Polytechnic
35	T01	Telephones	use for monthly telephone fees on campus
36	T07	Telephones	use for long distance charges
37	T12	Telephones	use for local calls made
38	300	Travel Contingencies	use for travel related to championship tournaments
39	371	Membership Dues	use for membership dues paid by your club's members
40	RU0	Income from Programs	use for income from all your activities and trips fees