

# **Segregated University Fee Policy, Process & Procedures**

WSG for Senate approval May 2nd, 2022 & Approved May 2<sup>nd</sup>, 2022, May 8, 2023

## **DEFINITION & OVERVIEW:**

The Segregated University Fee Allocation Committee (SUFAC) is the committee charged with allocating and reviewing segregated university fees and authorized to do so by the Whitewater Student Government (WSG) in accordance with their standing rules and University of Wisconsin System (UWS) policy 820.

## **STATE & REGENT Policy Referenced:**

Wisconsin State Statute 36.09

University of Wisconsin System (UWS) Policy 820.

## **FUNDING PRINCIPLES**

Campus leaders are charged to allocate funds with a high degree of stewardship and transparency and empower the most campus and student benefit from those allocations.

## **LEGAL RESPONSIBILITY/LIMITATIONS**

The University of Wisconsin- Whitewater, specifically the Segregated University Fee Allocation Committee (SUFAC) and Whitewater Student Government (WSG), operate under the following viewpoint neutrality standards:

1. Decision making members of SUFAC/WSG do not take into account a group's opinion or speech when making funding decisions.
2. When making eligibility decisions, SUFAC/WSG examines the uniqueness of service and campus benefit of the newly requesting group. SUFAC/WSG will not find a group eligible where there is direct duplication and access of service elsewhere on campus.
3. SUFAC/WSG ensures that all officers, members, and advisors are trained and well-versed in the definition of viewpoint neutrality and its application in funding decisions.
4. Policy 820 will be referenced for clarity on this topic.
5. Under Wisconsin State Statute, UW-Whitewater's SUFAC committee shall hereby follow Wisconsin State Statute §19.81 to §19.98.

## **ADDENDUM LISTING**

**Addendum A: Fee Flow Chart/Timeline Rev.**

**Addendum B: SUFAC Job Descriptions**

**Addendum C: SUFAC Procedural Guidelines**

**Addendum D: SUFAC Calendar**

**Addendum E: SUFAC Non-Allocable**

## **ALLOCABLE**

### **PURPOSE/ VALUE OF FUNDING**

Allocable Segregated Fees are intended to be used for items that can benefit the greater student population of UW-Whitewater.

- Impacts the greatest amount of students possible
- Education/learning opportunity
- Shared across campus
- Benefits/expands to more than one student
- Ties into the values of our university (potential training for the committee)
  - Collaboration.
  - Diversity and opportunity.
  - Integrity.
  - Learning and academic excellence.
  - Service and social responsibility.
  - Shared governance.

**ROLES & RESPONSIBILITIES - ALLOCABLE (cross located in Addendum B):**

**SUFAC (Whitewater)** - Attend scheduled training, allocable budget hearings and deliberations.

Review SUF application materials in preparation for budget hearing with an eye towards achieving the greatest benefit for the greatest percentage of the student body.

**WSG Speaker of the Senate** - Maintains communication with the SUFAC Chair, serves as an ex-officio member of SUFAC. May not serve as a member of SUFAC. Has the authority to place any SUFAC decisions on the Whitewater Student Government Agenda for review or adjustment. Must approve all contingency requests, or place them on the WSG agenda. The speaker cannot speak on behalf of SUFAC without express consent from the chair. Serves as the official voice of WSG on all allocable matters, and provides direction to SUFAC on behalf of WSG when requested/needed. The Speaker will convene SUFAC when the chair position is vacant and will facilitate the election of the chair at the first SUFAC session upon the vacancy.

**Chair** - Leads all SUFAC meetings in accordance with appropriate parliamentary procedures. Communicates the actions of SUFAC and represents the committee at meetings, including the monthly update to WSG. Participates in the Non-Allocable funding process and presents final budget recommendations to WSG and the Chancellor. Serves as the official voice of SUFAC. Maintains communication with the WSG Speaker to ensure WSG is apprised of SUFAC affairs. The chair of SUFAC chair serves at the pleasure of the Whitewater Student Government.

**Vice Chair** – Serves as the official record keeper of SUFAC and main recruiter of the committee. Leads meetings when the Chair is absent. Participates in the Non-Allocable funding process and attends final budget recommendation presentations to WSG and the Chancellor. The vice chair of SUFAC chair serves at the pleasure of the Whitewater Student Government.

**Vice Chair of Education Outreach** - Works with SAI to coordinate events and education training opportunities. Coordinate viewpoint neutrality training between SUFAC and WSG; in addition, coordinates educational outreach opportunities for SUFAC leadership. Participates in the Non-Allocable funding process and attends final budget recommendation presentations to WSG and the Chancellor. The SUFAC vice chair of educational outreach serves at the pleasure of the Whitewater Student Government.

**SUFAC Intern (not currently active)** - Assisting groups with SUF fee management as well as implementation of the SUFAC Compliance Review and deficit plan processes. It also serves as a point of contact for student organization leadership and advisors in regard to budget balance and appropriate spending. This position works closely with the Budget interns with assistance and training. This position is also responsible for other duties as assigned by chair/vice-chair/ advisor.

**SUFAC Advisor** - Provide support and guidance to the committee. Educate the committee on viewpoint neutrality during training and assists in monitoring its compliance throughout the process. They do not have voting rights and should not seek to have undue influence over the student voting members.

**SUFAC Support Team** - Provides committee support (calendar maintenance, room reservations, etc.), gathers additional information, and provides additional viewpoints. They do not have voting rights and should not seek to have undue influence over the student voting members. The support team consists of, at minimum, the SUFAC Chair, SUFAC Vice Chairs, SUFAC Advisor, Budget Intern, Student Organization support staff member, with additional individuals invited as needed.

**SUFAC Members** – Serves as a recommendation-making body for allocable fees, budget line-item adjustments, and contingency request funding. Participate in training and provide input to the committee on policy and process as well as funding recommendations and decisions.

The voting members of SUFAC represent the following constituencies: 1 from each of the Whitewater campus colleges including Graduate Studies (5 total), and 3 WSG representatives (one-year, two-year appointment and a Presidential appointment).

#### **SUFAC (Rock)**

**Chair** - Leads all Rock SUFAC meetings. Communicates the actions of Rock SUFAC and represents the committee at meetings, including the proposed allocations to WSG. Participates in the Non-Allocable funding process that occurs at the same time as allocable at the Rock campus.

**Advisor** - Provide support and guidance to the committee. Educate the chair and committee on viewpoint neutrality during training and assists in monitoring its compliance throughout the process. They do not have voting rights and should not seek to have undue influence over the student voting members. They work closely with Financial Services staff at Rock campus to facilitate the allocation process.

#### **STUDENT ACTIVITIES & INVOLVEMENT (SAI)**

**Full time Staff** - SAI Staff members will provide training, support and communication to Student organization leaders and advisors in requesting SUF monies as well as navigating university processes to spend those monies. SAI staff will also serve as the advisors to WSG and SUFAC and assist in the training of all those that are engaged in the allocation of SUF funds. SAI staff will assist with policy and process understanding for all SUF receiving groups, and spending for all organizations in the funding codes 128-0-409500 through 128-0-409699 and will attend SUFAC Support Team meetings. They will manage the authorization process for students to spend on behalf of funded organizations and Interface with financial services. Responsibilities also include overseeing official SUFAC records and, when applicable, delegating a non-SUFAC member to take minutes.

**Budget Interns** - Role includes supporting work of SUFAC and assisting groups with SUF fee management. Assists with implementation of the SUFAC Compliance Review and deficit plan processes. Serves as point of contact for student organization leadership and advisors in regard to budget balance and appropriate spending. Provides training opportunities and materials for student organizations interested in applying or reapplying for SUF monies as well as support in navigating university processes to spend monies allocated to them. Intern collects feedback on spending processes. Intern supports SUFAC in use of student groups management system (Connect) to communicate with organizations and create/manage forms for submission of budget materials (allocation requests, contingency fund requests, line-item change requests, etc.). They also update organizations regularly on balances and policy or process expectations. Responsibilities also include official SUFAC record keeping for all SUFAC weekly meetings as well as the allocable process in conjunction with the SUFAC advisor.

#### **SUF RECEIVING ENTITIES**

##### **SAI Budget Responsibility (Funding Codes 128-0-409500 through 128-0-409699)**

1. **Student Organization – Leaders** - Complete SUF authorized training if they serve as the primary spender for their organization (SAI supported groups). Create budget, represent

said organization during the hearing process, request contingency funds, and line-item changes as needed. Manage fundraising efforts to augment allocation. Manage travel details for members. Work with SAI to arrange for purchases and reimbursements.

2. **Student Organization – Advisors** - Complete SUF authorized training if they serve as spender for group (SAI supported groups). Support organizations in budget creation and management, fundraising efforts, and navigating campus policy. Attend hearing process and communicate with SUFAC committee when necessary.

### **Non-SAI Budget Responsibility**

1. **Student Organization – Leaders** - Create budget, represent group during hearing, request contingency funds, attend spender training, and line-item changes as needed. Manage fundraising efforts to augment allocation. Manage travel details for members. Work with advisor or departmental representatives to arrange for purchases and reimbursements.
2. **Student Organization – Advisors** - Support organizations in budget creation and management, fundraising efforts, and navigating campus policy. Work with group to manage purchases, reimbursements, and audits.
3. **Department Leadership** - Create budget, represent department during hearing, request contingency funds and line-item changes as needed. Manage fundraising efforts to augment allocation. Manage purchases, reimbursements, documentation and audits.

### **WHITEWATER STUDENT GOVERNMENT (Governance Role)**

1. Act as the final review and approval body for Allocable Segregated Fees
2. Has the ability to modify recommendations and direct allocations of funds.
3. Participates in the adjustment and appeal processes.
4. Has the ability to remove SUFAC members or officers with a 2/3 vote of the WSG Senate and consent of the WSG Speaker.

### **Budget Office**

Identified staff members are charged with executing decisions of SUFAC and WSG and serve as the official liaison for SUFAC and the budget office. This includes budget transfers, new org codes, forwarding university budget status, assisting with University Audit and information inquiries. They must consult SUFAC & Advisors before making changes to any processes or procedures that impact SUF-using organization/department ability to manage or use their funds. Any changes must be communicated to SUFAC and receiving organizations. Budget representative must also advise SUFAC about the current FTE and projected FTE for next fiscal year. The Budget office will notify SUFAC (sufac@uww.edu) 48 hours after sweep has been completed with group names and dollar amounts. The budget office representative should be the Assistant Vice Chancellor of Administration, or their designee.

### **Financial Services**

Process all the expenditure from SUF accounts. They must consult SUFAC & Advisors before making changes to any processes or procedures that impact SUF using organization/department ability to manage or use their funds. Any changes must be communicated to SUFAC and receiving organizations. When there are questions regarding expenditure /revenue entries they serve as the primary point of contact.

### **Vice Chancellor for Student Affairs**

They or their designee participates in Level 2 of appeals and assists in the non-allocable process in conjunction with student representation.

### **Office of the Chancellor**

Final approval of allocable fees. Hears Level 3 appeals and advocates on behalf of students to the Board of Regents.

### **Board of Regents**

All authority over fee establishment rests with the Board of Regents and they have final approval.

## **ALLOCABLE FUNDING**

### **TARGET TOTAL AMOUNT**

SUFAC will work in consultation with WSG to establish a total target dollar amount, or percent of increase/decrease in per-student allocable SUF fee prior to budget requests being submitted.

- SUFAC leadership and WSG leadership will work to establish this amount, before SUFAC recommends a final budget to the student government.
- During SUFAC/WSG training the speaker, along with the SUFAC Chair will discuss this matter with the WSG Senate.

### **NO GUARANTEE OF FUNDING**

Although a group may be eligible for funding, it does not guarantee they will receive any allocation. Additionally, continuous funding from one fiscal year to the next is not guaranteed. SUFAC has the right to say a partial no. "You need to tell us the full cost of your travel and understand that you will not be allocated for the full amount."

### **ALLOCABLE SUF RECEIVING GROUP REQUIREMENTS & GUIDELINES**

Any organization receiving segregated fees must follow all policies and procedures as outlined in this document and its addendums. They are required to be ethical in their decision making, requests and use of SUF dollars.

#### **Eligibility to apply:**

- I. Be an officially and currently recognized department or student organization at UW-Whitewater.

**Eligibility** - UW-W Student organizations that have completed the recognition/renewal process per university policy and student services units are eligible for funding with the following exceptions:

1. Those that restrict general membership, including but not limited to the following ways are not eligible:
  - a. Academic status (i.e., major and/or minor, GPA, and credit completion).
  - b. race, color, national origin, gender, gender identity or expression, religion, age, disability, veterans' status, ancestry, creed, sexual orientation, marital status, arrest record, military service, guard or reserve status, income level or source, witness protection, or any other federally protected identity.
2. Social fraternities or sororities, or honorary/professional societies.

3. Credit generating activities or organizations.
4. Groups wishing to be funded for a fiscal year must follow the application process, meeting all expectations of budget and supporting document submission, and budget hearing scheduling and attendance.
5. Groups wishing to carryover funds from one fiscal year to the next must request said funds following SUFAC's process, meeting all expectations of budget and supporting document submission, and budget hearing scheduling and attendance.
6. Groups wishing to request contingency funds, see Contingency Fund Policy below.
7. SUFAC reserves the right to further seek any supporting organizational documents which may assist in determining eligibility including, but not limited to, documentation presented in SUFAC related submissions.

### **Spending and Eligibility**

SUF-funded groups are expected to operate within institutional approved budgets annually. The SUF Intern, and vice chair will review program budgets for compliance on a regular basis. Please see the Compliance section of this document for details.

### **Maintaining Eligibility:**

To maintain eligibility to spend and apply for future funding, a group must:

- I. Be currently and officially recognized with the University
- II. Maintain records, documents, and receipts for possible audits.
- III. Make their financial records available to SUFAC or related entities.
- IV. Follow all campus spending policies.
- V. Organizations that have been found accountable via the Student Organization Conduct policy may not be eligible to spend or apply for funding dependent upon the rulings.
- VI. When SUF funds are used to support an activity, groups are encouraged to publicize the SUF fee fiscal support of activities through notation on publicity for events.
- VII. Maintain budgets in a solvent state.

### **NEW ORGANIZATION REQUEST**

Organizations in their first year of operation will have additional guidelines to follow when going through budget requests. The budget line guidelines are the same as organizations that have received SUF funding in the past. Organizations returning to the SUF process after 5 or more years would go through this process of additional guidelines. The goal of the additional guidelines is to establish a connection with the organization and ensure they are knowledgeable of resources available, while helping SUFAC to understand the mission of the organization and purpose of the request. The current SUFAC can make a decision whether or not to put an allocation cap on new organizations.

**ALLOCATION GENERAL TIMELINE** (cross located in Addendum A) - The Allocable process begins in February each year with the selection/appointments to SUFAC.

**Training** - Committee training is required and will be coordinated by the SUFAC advisors and will be done in conjunction with WSG training no less than 4 hours each semester. Topics that must be included are: Viewpoint Neutrality, Allocation Process/Procedures, Related Case Law Review, Ethical Decision Making, Implicit Bias, Roles, and other topics as identified by student leaders or advisors.



### **SUFAC Procedural Policy - (cross located in Addendum C)**

SUFAC will review annually by April 1st and submit changes to SUFAC procedural guidelines to WSG for approval. That document once approved will be communicated to all SUF receiving entities as well as SAI/ Financial Services/Budget staff. **Exceptions to any of these policies must be specifically approved by the full Segregated University Fee Allocations Committee and communicated in writing to WSG at time of approval**

### **ADJUSTMENT & APPEAL PROCESS**

The University of Wisconsin-Whitewater establishes an adjustment and appeal process within Whitewater Student Government for the review of student fee funding decisions in accordance with the University of Wisconsin System Administration, Financial Administration, Segregated University Fees (820) policy, Section II(A)(6)(e). In communication from SUFAC regarding allocation recommendations, sent to all applicants by SUFAC, all will be made aware of specific dates for notification of the WSG speaker, related WSG meetings, as well as final adjustment and appeal deadlines.

#### **I. ADJUSTMENTS Process:**

##### **A. ADJUSTMENTS - FIRST LEVEL - WSG ADJUSTMENT/APPROVAL**

##### **SUFAC Eligibility Status or Funding Amount:**

1. A group that applied for segregated fees who believes it has been aggrieved by a SUFAC recommendation on eligibility can request WSG agenda inclusion by notifying the WSG Speaker (wsgpseaker@uww.edu) by the Friday prior to the SUFAC recommendations being reviewed and approved by WSG. This notification ensures that WSG will address any concerns brought up in the notification to the Speaker. The grounds may suggest change in eligibility or alternative allocation amount, but groups may not submit a revised request.
2. In order for an allocation amount to be adjusted, groups are encouraged to speak directly with a WSG Senate member(s) who can make a motion to adjust the outcome (that motion must be seconded and passed by  $\frac{2}{3}$  vote of WSG Senate).
3. WSG may either accept, reject or modify the SUFAC's original recommendations by a vote of  $\frac{2}{3}$  of the members present at the meeting, and where quorum has been met. WSG may consult SUFAC at that meeting for further information or clarification.
4. If the adjustment involves a budget allocation amount, the adjustment must be based on the identical budget submitted to and considered by SUFAC.
5. Official budget recommendations from SUFAC to the requesting groups will be provided no later than 72 hours prior to the deadline to file an appeal with WSG to group leaders and their advisors by SUFAC support personnel.



## **B. ADJUSTMENTS - SECOND LEVEL**

There is not a second level of adjustment other than a motion to reconsider at the WSG Senate meeting immediately following the approval of allocable allocations meeting. In order for a motion to reconsider to occur:

1. A member of the WSG Senate that voted “aye” on the final Allocable SUF Allocation motion that passed may request a motion to reconsider
2. The request must be forwarded to the WSG Speaker (wsgspeaker@uww.edu) no later than Noon the Friday before the meeting immediately following the vote.
3. If a request has been made, the WSG Speaker will notify the SUFAC chair (sufac@uww.edu) in writing of the request, within 24 hours of the request being received.

## **II. APPEAL Process:**

In accordance with Section II(A)(6)(e) of UW System Policy 820, a process is hereby developed in student government for the review of student fee funding decisions involving allegations that the decision was based on a student organization’s extracurricular speech or expressive activities in violation of viewpoint neutrality standards. Viewpoint neutrality standards are defined as,

Late submission of budget materials to SUFAC, disagreement with SUFAC’s decision, or failing to attend a budget hearing does not constitute an appeal to WSG, unless there are allegations of viewpoint neutrality violations.

A group that applied for segregated fees who believes it has been aggrieved by an allocable student segregated fee funding decision or eligibility decision made by SUFAC or WSG acting pursuant to s. 36.09(5), Wis. Stats., may appeal the decision to the Whitewater Student Government (WSG) where:

### **A. VIEWPOINT NEUTRALITY APPEALS - FIRST LEVEL**

1. The appeal alleges that the decision was not made in a viewpoint neutral manner as defined in Section II(A)(6)(e) of UW System Policy 820; and
2. The appealing party notifies the WSG Speaker(wsgspeaker@uww.edu) by the last day of the semester (see Academic Calendar). Who in turn notifies the WSG membership, SUFAC leadership (sufac@uww.edu) and Chancellor within 72 hours of receipt.
3. If evidence of a viewpoint neutrality violation is produced after the WSG review of SUFAC recommendations is complete or WSG learns of SUFAC violations, those submitting appealing will need to follow the Second level of appeal below.

## **B. VIEWPOINT NEUTRALITY APPEALS - SECOND LEVEL**

In order to address conflict of interest as well as appeals that happen after the allocable SUF process has been completed, the Viewpoint Neutrality Appeals Committee (VNAC) is established.

### **1. Membership:**

- a. Voting: WSG Executives (2), WSG Speaker (1), SUFAC Leadership (3)
- b. Any voting member who is a member of an involved group is expected to recuse themselves and the organization will appoint a temporary replacement.
- c. Non-Voting: SUFAC Advisors, WSG Advisor

### **2. The VNAC is expected to comply with Open Meeting Law (Wi SS 19.81-19.98) as well as Open Records requests.**

### **3. HEARING PROCESS Procedures:**

- a. The WSG President will serve as the VNAC chair
- b. The Chair will review the process and provide UW System materials defining Viewpoint Neutrality before the hearing begins.
- c. No inappropriate behavior or language will be permitted during the hearing. Any individual disrupting the hearing or acting inappropriately will be warned once by the Chair and on additional instances of disruption, may be removed from the hearing by the Chair.
- d. The chair will read the communication provided when the appeal was filed and give VNAC time to review documentation.
- e. Those that have filed the appeal will be given 5 minutes to state their case, during which time they may present evidence or have witnesses testify.
- f. VNAC members have the right to ask questions of anyone present as well as any witnesses called.
- g. VNAC members will discuss the appeal and come to a decision regarding the appeal, documented by a vote.
- h. In the case of a tie vote on the outcome of the appeal, the appeal will be forwarded to the policy's third level of appeal.
- i. In the case of an appeal being denied, communication from the VNAC chair will be sent to all those present, as well as WSG, SUFAC and the Chancellor.
- j. In the case that a viewpoint neutrality violation is found to have occurred, VNAC will make a recommendation on how to address the eligibility & allocation final outcome and send notification to the appealing group and Chancellor.

## **C. VIEWPOINT NEUTRALITY APPEALS - THIRD LEVEL**

Upon the issuance of the WSG or VNAC decision, the appealing party may appeal the decision(s) to the UW-Whitewater Chancellor.

### **1. PROCESS:**

- a. Requirements:

- i. The appeal must be in writing (hand or electronically) and submitted to the Chancellor's Office within 72 hours of the date the final budget is approved by WSG; and
  - ii. The appealing party must demonstrate that the group has exhausted all avenues of appeal available to them through SUF procedures; and
  - iii. The appealing party must specify the allocable funding and or eligibility decision resulted because of a violation of viewpoint neutrality
  - iv. If the appeal fails to meet all of the conditions above, the WSG or VNAC decision will be considered final.
- b. If the written appeal meets all of the conditions above, the Chancellor shall review the matter on the existing record and shall issue a written decision within 14 days of the receipt of the appeal.
- c. If the Chancellor chooses to appoint a designee, with the exception of any involved party, to lead the review of the matter, the Chancellor shall notify the appealing group and WSG of the designee's name within 48 hours of receipt of the appeal.
- d. Any meetings to discuss the issue shall be initiated by the Chancellor or their designee and shall be held at the Chancellor's discretion and under their direction. The Chancellor or their designee may request additional documentation or materials any time, and those materials shall be provided in their entirety within 72 hours.
- e. Upon review of the appeal, the Chancellor may affirm, deny or change the decision of the SUFAC/WSG/VNAC. The Chancellor's decision shall be submitted to all parties involved within 72 hours of the decision being made. If the Chancellor's decision results in a modification to the SUF budget, the Chancellor shall discuss said changes with SUFAC and WSG prior to forwarding the institution's budget to System Administration and the Board of Regents.
- f. If the change happens after forwarding the institution's budget to System Administration and the Board of Regents, the Chancellor or their designee will communicate details of how it will be addressed at the campus level with those budget constraints.
- g. The Chancellor's decision shall be final unless the matter is brought to the Board of Regents in accordance with Regent Policy Documents 30-3 and 30-5.
- h. Existing record is comprised of the official documentation related to the funding decision and the appeal of that decision to date. While an appealing party may submit information beyond what is the minimum as outlined in section 3, the Chancellor's review shall be based on the existing record. Appealing parties should not expect, request, nor attempt to submit briefs

or to present information to the Chancellor or their designee outside of the formal process.

- i. Late submission of budget materials to SUFAC, disagreement with SUFAC/WSG's decision, or failing to attend a budget hearing does not constitute an appeal to the Chancellor, unless there are allegations of viewpoint neutrality violations.

### **III. Record of Policy and Notification Requirements:**

This policy is created and maintained by Whitewater Student Government in coordination with the Office of the Chancellor. Its provisions are binding on all students, recognized student organizations, departments, and WSG.

This policy must be communicated annually to SUFAC/WSG members and the leaders of student organizations as part of their recognition process.

**As of April 2022, student organizations have no individual right to appeal to the Board of Regents.**

### **BUDGET ACCOUNTABILITY**

1. SUF-funded groups that misuse SUF-funds will be referred to the Dean of Students office, appropriate student conduct officials, divisional leadership, or appropriate authorities.

### **OVERSPENDING**

2. SUF-Funded groups that plan to overspend their budget must receive approval from SUFAC prior to overspending their account. They must provide a date on which they are able to pay back any overspending.
3. During the fiscal year: Any UW-Whitewater SUF-funded program that overspends their account, without approval from SUFAC, or fail to make the deadline to payback their expenditures, during said fiscal year will have a proportional amount in allocation and expenditure authority removed from their following year budget. A revised budget may be required for the SUF-funded organization to match the reduced funding and spending authority.
4. SUF-funded groups that overspend their budget without prior consent or approval from SUFAC and/or WSG may be deemed ineligible for SUFAC allocation after a second year of overspending.
5. Any SUF funded organization that overspends may be required to meet with SUFAC to develop sound fiscal management practices for the program and the potential for future reduced allocations. SUFAC reserves the right to freeze any overspent account if it deems it necessary.
6. SUF- Receiving organizations are subject to SUFAC Spending Review process. See SUFAC Spending Review in this document.

## **BUDGET REVISION**

### **I. BUDGET LINE-ITEM TRANSFERS**

#### **Process for requesting a Budget Line-Item Transfer:**

The transfer of previously allocated funds from one line item of a budget to different line item.

1. For requests less than \$100, any SUF funded organization must fill out the budget Line Transfer Under \$100 Form and submit it via Connect to notify SUFAC of its intention to move money. The form must be filled out completely, with the amount being transferred and specific reasoning for the transfer. No additional approval is needed for transfers of this size.
2. For requests \$100 and over, any SUF funded organization must fill out the SUFAC Budget Line-Item Transfer Request Form and submit it via Connect. The form must be filled out completely, with the amount requested for transfer and specific reasoning for the transfer. An example that would most likely be approved would be if a previously budgeted item is no longer feasible or beneficial to the organization.
3. The SUFAC will convene at the next available opportunity to discuss the request. Immediately following the review of the request, SUFAC will vote on the transfer request. For any request a quorum of 5 is required. In the event of a tie in voting, the SUFAC Chair will serve as the deciding vote on the request.
4. Following a decision on the budget line-item transfer request, the SUFAC Chair will communicate the decision to the requesting organization's leadership, advisor, Budget Office and Student Activities & Involvement (SAI)).

## **MID YEAR BUDGET ADJUSTMENTS**

If a SUF receiving organization wishes to amend their budgeted allocation mid fiscal year, they will submit a comprehensive budget following the Budget Line-Item Transfer process above to SUFAC.

## **CARRY OVER PROCESS**

Individual organizations' allocable student fee monies (when \$100 or greater) from one fiscal year will not be carried over into another fiscal year without the SUFAC's consent. Carryover balances under \$100 will automatically be carried over. A revised budget will not be required. Carryover requests shall hereby be submitted by the fifth week of the fall semester, for all carryovers regardless of amount.

Organizations with \$100 or more at the end of a fiscal year may apply for the monies to be carried over into the next fiscal year by completing the necessary request form by the SUFAC established date during the fall semester. **SUFAC may choose to take action before, during or separate from the annual allocation process.**

Budget office staff will automatically sweep balances into SUF Contingency Fund upon the completion of SUFAC's decision making process each year if a carryover request is not approved by SUFAC. Budget office will notify SUFAC (sufac@uww.edu) 48 hours after sweep has been completed with group names and dollar amounts.

## CONTINGENCY FUND REQUESTS

A fund established which may be used to cover unanticipated expenditures and/or for expansion of programs of **currently recognized and eligible** Student Organizations, allocable campus departments. Non-Allocable groups requesting money from the SUFAC Contingency Fund, must consult the Whitewater Student Government, who would submit the request on that department's behalf. Requesting the funds is to be done in accordance with the *Segregated University Fee Policy, Process & Procedures, and the following expectations*.

### A. Parameters within which requests would be considered:

1. Unanticipated expenditures: this type of request would be to cover costs associated with programs which were funded but will incur expenses which could not have been anticipated at the time of budget hearings. Such requests will be considered if the request is submitted, if possible, prior to the expenses being incurred.
2. New program and/or expansion of programs: requests for funds to support new programs and/or expansion of existing programs would be considered on the following basis:
  - i. The request is not for reestablishment of funds previously requested and denied.
  - ii. The request is to fund a new program which is within the purview of the requesting organization.
  - iii. The request is for an expansion of existing programs based on identifiable increases in participation and/or needs of the student body.
  - iv. Request would allow for a greater increase in participation by a larger number of the student body.

### B. Process for requesting contingency funds:

1. The requesting organization must fill out the SUFAC Contingency Fund Request Form and submit it via Connect. The form must be filled out completely, with the amount requested and specific reasoning for the request.
2. SUF-funded groups that request contingency funds, and have external bank accounts, including, but not limited to a Student Faculty Account (SFO), must state the current balance, and explain why those funds cannot support the contingency request before SUFAC.
3. SUFAC will review the request. For all contingency requests, a quorum of 5 will be required to vote. In the event of a tie, the SUFAC Chair will serve as the deciding vote on the request.
4. For contingency request recommendations less than \$10,000.00, the contingency request will be forwarded to the WSG Speaker for informational purposes, and approval from the WSG Speaker. For contingency requests of \$10,000.00 or more, the contingency request recommendation will be forwarded to the WSG Speaker for review and to be placed on the WSG Senate Agenda for approval if the speaker deems it necessary. SUFAC's recommendation may be altered under a 2/3rds Senate vote.
5. Following approval of the contingency fund request by SUFAC and WSG endorsement, the SUFAC Chair will communicate the decision to the requesting organization and Student Activities & Involvement.

6. Should the WSG Senate alter, overturn, or deny a request, the WSG Speaker will communicate the decision to the requesting organization and Student Activities & Involvement.
- C. Process for Setting Contingency Fund Floor:
1. Each year SUFAC will determine an acceptable minimum limit for the Contingency Fund. During the year, if the Contingency Fund should reach this limit, the full committee will meet to reevaluate the limit and any Contingency Fund requests. The contingency fund floor amount will be approved by the WSG Senate prior to the annual allocable presentation.

### **REQUEST TO OVERSPEND**

The requesting organization must fill out the SUFAC request to overspend form and submit it via Connect. The form must be filled out completely, with the amount planned to overspend, a realistic pay-back deadline, and why the group plans to overspend. The SUF-funded group must state how they plan to pay back the expenditure and the current balance of any external bank accounts, including, but not limited to a Student Faculty Account (SFO). The SUFAC Chair will either approve these or bring them before SUFAC to be denied by a majority vote. Any approved request will be forwarded to the WSG Speaker for final approval or to be altered by a 2/3rds vote of the WSG Senate.

### **SUFAC SPENDING REVIEW**

Segregated University Fee (SUF) funded programs are required by the University of Wisconsin System policy to operate within institutional approved budgets annually, and deficit spending of accounts is not permitted. The SUFAC Spending Review's purpose is to provide accountability and oversight to the proposed categories and actual spending of SUF receiving organizations in reference to their requests. It is intended to be a helping opportunity in supporting ethical and proper spending of segregated fees, and to assist in future budgeting. The organizations under review and the findings of the review will be the purview of SUFAC and not administratively influenced.

### **Process of Implementation**

1. Reviews shall be completed in the spring semester of the academic year.
2. SUFAC Vice Chair, per their position description, confirms the list of organizations that will be under review and forwards the list to the Budget Intern.
3. Budget Intern, per their position description, conducts a review of the organizational use of monies compared to the approved SUFAC budgets and presents a Review Summary to SUFAC for each organization under review.
4. The SUFAC Vice Chair will share the findings with each organization, and the WSG Senate.

### **Results of Review**

1. Should the organization be found in compliance, SUFAC will take no further action.
2. Should the organization be found in non-compliance, SUFAC will take action as outlined in the SUFAC Allocation Guidelines found in this document. Failure to pass a review would automatically qualify the organization for review the following year.
  - a. SUFAC will determine the groups immediate and further eligibility based on the findings of the review.



## EXISTING FEE ALLOCATION PROCESS

In the case that already collected segregated fees cannot be spent due to policy change or improper allocation, SUFAC, WSG leadership and Advisors will meet with Budget office staff and determine the reallocation action and timeline.

Action Guidelines:

1. Regardless of the approach required, SUFAC will notify all eligible organizations of the reallocation process. SAI will assist with this communication if requested.
2. If the total amount is less than the equivalent of \$1 per student currently enrolled, the fee will be rolled into the Contingency Fund.
3. If the total amount is the equivalent of \$1 or more per student currently enrolled, the fee will be held until a reallocation process is completed.
  - a. This process will require organizations to submit a request via the communicated method to SUFAC. Those requests will be forwarded to the WSG Speaker (wsgspeaker@uww.edu) shared with WSG Senate. They will, if time allows, make a recommendation to WSG. If time does not allow SUFAC leadership will attend the WSG meeting where the requests will be reviewed and offer input.
  - b. There is no appeal process for the reallocation of fees except by a motion to reconsider the decision at the next scheduled WSG meeting. Requests for that motion should be made to the WSG Speaker (wsgspeaker@uww.edu) by Friday Noon preceding the next scheduled WSG meeting.

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## NON-ALLOCABLE

Non-allocable segregated university fees (SUF) are those SUF that are used to support long-term commitments for fixed financial obligations, ongoing operating costs of university owned or controlled buildings, and similar commitments for student unions, health centers, childcare centers and recreational sports centers.

The group responsible for reviewing and participating in the non-Allocable approval process will be known as the **Non-Allocable Leadership Team (NALT)**.

This group will consist of: WSG President, WSG Vice- President, WSG Speaker, SUFAC Chair, SUFAC Vice Chairs (2), Assistant Vice-Chancellor for Student Affairs, WSG Advisor and Budget Office Advisor.

At the beginning of each academic year, or the first NALT meeting, the WSG President, WSG Vice-President, WSG Speaker, SUFAC Chair, and SUFAC Vice Chairs (2) will elect a convener, who will facilitate Non-Allocable hearing, and deliberation, in conciliation with the Assistant Vice Chancellor of Student Affairs.

Viewpoint neutrality is not a standard that applies to the Non-Allocable Process, unless a student organization (who is not WSG or SUFAC) should become funded by non-allocable segregated fees.

Subject to approval from UW System legal

## **ROLES & RESPONSIBILITIES - NON-ALLOCABLE:**

### **SUFAC (Whitewater)**

**Chair** - Participates in the Non-Allocable funding process and presents final budget recommendations to WSG and the Chancellor.

**Vice Chair** – Participates in the Non-Allocable funding process and presents final budget recommendations to WSG and the Chancellor.

**Vice Chair – Education Outreach** - Participates in the Non-Allocable funding process and presents final budget recommendations to WSG and the Chancellor.

**SUFAC Advisors** - Is kept informed of the non-Allocable process and is a non-voting member

**SUFAC (Rock)** - The Non-allocable process is combined at the Rock campus with the allocable process

### **Non-Allocable SUF Receiving Entities - Department Leadership**

Create budget, represent department during presentation, request contingency funds and line-item changes as needed. Manage purchases, reimbursements, documentation and audits.

### **Whitewater Student Government**

WSG President, Vice President, and Speaker serve on the committee that reviews Departmental requests and proposed fee rates. WSG Advisor participates with NALT

### **Budget Office**

The Assistant Vice Chancellor of Financial Services or their designee participates in the non-Allocable process. Complete budget and fee updates as approved by the Vice Chancellor and Chancellor. Communicates UW System budget deadline information to the Vice Chancellor for Student Affairs. In consultation with the Assistant Vice Chancellor for Student Affairs, they will develop the calendar for the allocation of fees for the upcoming year's process.

### **Vice Chancellor for Student Affairs**

Or their designee is the primary advisor of the non-allocable allocation process. Coordinates the distribution of information to all campus department leadership (those requesting funds) associated with the non-allocable budget process. In consultation with the Budget Office, they will develop the calendar for the allocation of fees for the upcoming year's process.

### **Student Government Advisor**

Assists the Vice Chancellor or their designee in the non-allocation process.

### **The Chancellor**

Final approval on a non-allocable budget.

### **Board of Regents**

All authority over fee establishment rests with the Board of Regents and they have final approval.

**General Timeline** - The Non-Allocable process begins in July each year with the selection/appointment of SUFAC. The Vice Chancellor, in consultation with the Budget office will establish allocation timeline, deadlines and communicate that to SUFAC and departmental leadership.

In July, NALT will meet with the chancellor and other relevant parties to discuss general parameters and objectives for the next budget cycle.

**Training** - Those participating in the non-allocable process, will receive direction from the Assistant Vice Chancellor of Student Affairs prior to the start of the process.

## **Non-Allocable Procedural Policy**

### **I. Development, Review and Approval of Non-Allocable Fee budgets:**

- a. The ongoing UWW non-allocable fee budgets are identified those supporting Athletics & Recreation Sports (Laundry, Fac Management, Intramurals, Outdoor facilities and fields, General Recreation, Men's & Women's Wheelchair Basketball), LGBTQA\*, Children's Center, Municipal Services, Bonding/Debt Service, Org Act Admin charge/Student Act fees/SUFAC, Textbook Rental, Dean of Students Office, Health Center, University Center, Student Activities & Involvement, and Young Auditorium. These fee budgets are reviewed in accordance with the process outlined herein. Additional bonded project budgets and fee schedules might also be considered during the non-allocable process.  
Municipal Services is a state mandated fee paid to the City of Whitewater by the Wisconsin Department of Administration (DOA) for partial reimbursement for police and fire protection services provided to the UW-Whitewater campus community.
- b. The Organization activity Administration Charge, Student Activity fees, SUFAC accounts will be presented by Student Activities and Involvement.
- c. Approval of new bonding and receive Information for the existing bonding/debt service accounts will be provided by the Budget Office for Non-Allocable review .
- d. Non-allocable budgets are developed in accordance with guidelines, timelines, and thresholds provided by the UW-System Budget Office each January.

### **II. Presentation of Non-Allocable Budgets**

1. Student Input in Budget Development - Non-allocable fund receiving programs/departments are expected to demonstrate student input during the budget process (e.g., University Center Board, Student Health Advisory Committee).
2. Education/Context Meetings - The non-allocable context meetings and budget presentations will be made to the Assistant Vice-Chancellor for Student Affairs, Advisor to WSG, Budget Office Representative, SUFAC Leadership and the WSG President, WSG Vice President, and WSG Speaker by the respective Program Directors. These meetings will be based on scheduling needed to meet campus and System deadlines. The Chair, Vice-Chairs of SUFAC, WSG President, WSG Vice President, and WSG Speaker will be given a reasonable opportunity to ask questions pertaining to any of the non-allocable budgets during the appropriately scheduled budget presentations.
3. When non-allocable receiving units are considering more than 2% increase the Assistant Vice Chancellor for Student Affairs, WSG Advisor and Budget Office Advisor will confer with unit leadership and AVC will follow up with units as

needed. The final determination on possible increases to rates, will be reviewed by the student participants and will need a simple majority for approval.

4. The student leaders that participate in the process are responsible for communicating the non-allocable budget process to SUFAC and WSG.
5. The non-allocable segregated fee schedule and presentation will be developed for presentation to the Chancellor by the NALT Convenor in consultation with the rest of NALT. A draft of the document will be forwarded to the non-Allocable leadership for review prior to the presentation. The Vice Chancellor of Student Affairs and the Non-Allocable leadership will be invited to participate in the presentation to the Chancellor.

### III. Bonding Request Process -

1. Materials Required.
2. Time Frame for Submission
3. Bonding Agreement Documentation - A formal signed agreement

### **NON-ALLOCABLE BUDGET REVISION**

Follows University Budget revision guidelines and procedures.

### **BUDGET LINE-ITEM TRANSFERS**

Follows University Budget revision guidelines and procedures.

### **RESERVE SPENDING**

Follows University Budget revision guidelines and procedures.

### **BUDGET FORECASTING**

As a part of the non-allocable process, NALT will, in collaboration with the budget office and other relevant parties, create a five-year forecast of fees and capital projects. This forecast is not binding.

### **POLICY REVIEW/REVISION**

A Review Committee, called by the SUFAC or NALT, will meet each Spring semester, or more often, if necessary, to review the Segregated University Fee Policy, Process & Procedure. Changes to the process or policy cannot be made without WSG, and Vice Chancellor of Student Affairs approval. If changes are needed the Review Committee the SUFAC Advisor will call a meeting to discuss the proposed changes and ramifications on stakeholders. The Committee will consist of: NALT and the SUFAC Advisors.

**ADDENDUM A - THIS PAGE NEEDS UPDATING ONCE CALENDAR IS APPROVED**

[illegible]

## **ADDENDUM B –**

### **University of Wisconsin Whitewater SUFAC Committee**

#### **POSITION: SUFAC Chair**

**SUMMARY:** Once elected annually by a majority vote of the committee, the SUFAC Chair serves as the coordinator and primary student representative in the segregated fee process. The SUFAC Chair works closely with WSG, SUFAC Student Affairs Administrative Advisor, Budget Advisor, and SUF Intern and provides administrative support. They will have access to all SUF accounts (Wiser) and Connect. The SUFAC Advisor will coordinate the position's recruitment, selection and training.

The SUFAC Chair is responsible for the following functions:

1. Organize and schedule all SUFAC meetings including preparation of agendas for meetings and chair the SUFAC meetings according to appropriate parliamentary procedures.
2. Communicates the actions of SUFAC including awards, contingency requests, and other correspondence to student organizations.
3. Meets with SUFAC Advisors and appropriate individuals to address and complete various issues with SUF funded organizations.
4. Represents SUFAC at meetings where future funding issues and requests are discussed.
5. Provide monthly updates to Whitewater Student Government (WSG).
6. Formally present budget recommendations to WSG, the Chancellor and Vice Chancellor for Student Affairs.
7. Annually reviews instructions for budget requests.
8. Provides budget consultations with SUF receiving groups.
9. Participate in the Non-Allocable funding process
10. Assist with developing committee training and implementation.
11. Ensure communication between Chair, Vice Chair, Vice Chair of Ed Outreach, SUF Intern, WSG, Advisors and Budget Office.
12. Attend UW System sponsored conference for SUF Committee leadership (every other year).
13. Meet with students and advisors to ensure student success.
14. Review annual goals for SUFAC.
15. Delegates to other SUFAC members as needed.
16. Complete other duties as needed.

**COMPENSATION:** \$2000 paid over the academic year

**REMOVAL:** Removal of the person serving in this role can be initiated by the Vice-Chair upon two unexcused absences from SUFAC meeting. Appointed members serve at the purview of the appointing authority until the completion of Spring Training. After that point in time, the appointment may be removed by the appointing authority petitioning SUFAC. Removal vote must pass a two-thirds vote of SUFAC.

## **University of Wisconsin Whitewater SUFAC Committee**

### **POSITION: SUFAC Vice Chair**

**SUMMARY:** Once elected annually by a majority vote of the committee, the SUFAC Vice Chair serves as the backup coordinator in the segregated fee process. The SUFAC Vice Chair works closely with WSG, SUFAC Student Affairs Administrative Advisor, Budget Advisor, and SUF Intern and provides administrative support. They will have access to all SUF accounts and Connect. The SUFAC Advisor will coordinate the position's recruitment, selection and training.

The SUFAC Vice Chair is responsible for the following functions:

1. Attend all SUFAC meetings.
2. In the absence of the SUFAC Chair, chairs the SUFAC meetings according to appropriate parliamentary procedures.
3. Fiscal tracking, budget creating and request of SUFAC budget and account.
4. Attend presentation of SUFAC recommendation to WSG.
5. Create, for SUFAC approval, SUF receiving entities audit schedule.
6. Attend presentation of budget recommendations to WSG, the Chancellor and Vice Chancellor for Student Affairs.
7. Ensure communication between Chair, Vice Chair of Ed Outreach, SUF Intern, WSG, Advisors and budget office support.
8. Participate in the Non-Allocable funding process.
9. Meet regularly with SUFAC Advisor and SUFAC Leadership to ensure success of SUFAC operations.
10. In charge of recruitment for SUFAC appointments for next academic year.
  - a. Sends communication to appropriate people to have SUFAC representative appointments made for the following year.
11. Attend a UW System sponsored conference for SUF Committee leadership (every other year).
12. Meet with students and advisors to ensure student success.
13. Review annual goals for SUFAC.
14. Complete other duties as needed.

**COMPENSATION:** \$750 paid over the academic year

**REMOVAL:** Removal of the person serving in this role can be initiated by the Chair upon two unexcused absences from SUFAC meeting. Appointed members serve at the purview of the appointing authority until the completion of Spring Training. After that point in time, the appointment may be removed by the appointing authority petitioning SUFAC. Removal vote must pass a two-thirds vote of SUFAC.



## **University of Wisconsin Whitewater SUFAC Committee**

### **POSITION: SUFAC Vice Chair of Educational Outreach**

**SUMMARY:** Once elected annually by a majority vote of the committee, the SUFAC Vice Chair of Ed Outreach will serve to be the liaison between SUFAC and the broader campus community. This person will assist SUFAC in ongoing student opinion on segregated fees, as well as educating students on how their segregated fees are used. This person will also serve to educate student organizations on the SUFAC application and decision-making process. The SUFAC Vice Chair of Educational Outreach will coordinate speaking events for the Chair, Vice Chair, and Vice Chair of Educational Outreach to attend.

The SUFAC Vice Chair of Educational Outreach is responsible for the following functions:

1. Attend all SUFAC meetings.
2. Coordinate educational outreach opportunities for the Chair, Vice Chair and Vice Chair of Educational Outreach.
3. Coordinate attendance by the Chair, Vice Chair, or Vice Chair of Educational Outreach to two SUFAC funded organization meetings per month.
4. Assist the Vice Chair in member recruitment outreach to the Deans of each college and WSG.
5. Work with Student Activities & Involvement to coordinate events and education training opportunities.
6. Maintain all social media present.
7. Coordinate attendance and tabling for the Fall and Spring Involvement Fairs.
8. Participate in the Non-Allocable funding process.
9. Coordinate viewpoint neutrality training between SUFAC and WSG
10. Attend presentation of budget recommendations to WSG, the Chancellor and Vice Chancellor for Student Affairs.
11. Attend UW System sponsored conference for SUF Committee leadership (every other year).
12. Meet with students and advisors to ensure student success.
13. Review annual goals for SUFAC.
14. Complete other duties as needed.

**COMPENSATION:** \$750 paid over the academic year

**REMOVAL:** Removal of the person serving in this role can be initiated by the Chair upon two unexcused absences from SUFAC meeting. Appointed members serve at the purview of the appointing authority until the completion of Spring Training. After that point in time, the appointment may be removed by the appointing authority petitioning SUFAC. Removal vote must pass a two-thirds vote of SUFAC.

**University of Wisconsin - Whitewater  
SUFAC Committee**

**POSITION: SUFAC Member**

**SUMMARY:** One SUFAC member is appointed from each college by the deans, three SUFAC members are appointed by Whitewater Student Government (one presidential appointment), and one by the Residence Hall Association.

SUFAC members are responsible for the following functions:

1. Attend scheduled SUFAC training, allocable budget hearings, allocable budget deliberations, SUFAC context-in-education meetings, and policy meetings. This is an approximate time commitment of 60 hours over the course of the academic year.
2. Reviews SUF application materials in preparation for budget hearings.
3. Reviews budget requests with an eye towards achieving the greatest benefit for the greatest percentage of the student body and/or towards filling needs that are currently not met.
4. Participates in the deliberation process according to appropriate parliamentary procedures.
5. Communicates with the Chair, Vice-Chair and other support members of SUFAC to facilitate scheduling of meetings and execution of SUFAC business.
6. Supports SUFAC and provides information about SUF funds and procedures to interested individuals.
7. Assists with recruitment of new SUFAC members.
8. Completes other duties as needed.

**COMPENSATION:** \$150 paid at the end of the fall semester

**REMOVAL:** Removal of a person serving in this role can be initiated by the Chair upon two unexcused absences from SUFAC meeting. Appointed members serve at the purview of the appointing authority until the completion of Spring Training. After that point in time, the appointment may be removed by the appointing authority petitioning SUFAC. Removal vote must pass a two-thirds vote of SUFAC.

## **University of Wisconsin Whitewater SUFAC Committee -**

### **POSITION: SUFAC Intern**

- The SUF Intern position is credit-optional, if credit is sought student should meet departmental internship requirements.

**SUMMARY:** This salaried intern is responsible for assisting groups with SUF fee management as well as implementation of the SUFAC Compliance Review and deficit plan processes. It also serves as a point of contact for Student Organization leadership and advisors in regard to budget balance and appropriate spending. This position will work in close proximity with the Budget Office with assistance and training. They will have WISER access to all SUF accounts and Connect. The SUFAC Advisor will coordinate the position's recruitment, selection and training.

The SUFAC Intern is responsible for the following functions:

1. Serve as the review initiator and deficit plan monitor as directed by SUFAC.
2. Serve as the record keeping officer of SUFAC. This includes being responsible for taking, posting and uploading approved committee minutes.
3. Work with Budget Office, SUFAC Chair, Vice Chair, and Advisor regarding SUFAC process.
4. Define with Chair/Vice Chair and Advisor SUFAC Spending Review.
5. Maintain an up-to-date list of SUFAC eligible organizations or departments.
6. With Administrative Assistant, send out correspondence inviting requests and deadline reminders.
7. Attend presentation of SUFAC recommendations to WSG.
8. Create and provide data for website and PR Data for WSG to use in the SUFAC education campaign.
9. Ensure communication between Chair, Vice Chair, SUF Intern, WSG, Advisors and Budget Office support.
10. Update Organizations' Leadership and Advisor with their account balances 2 times per semester.
11. Secure and review any budget revisions required from organizations.
12. Communicate to Chair, Vice Chair, and Vice Chair of Educational Outreach various issues with SUFAC funded organizations.
13. Answer inquiries regarding account balances and access. Work with SUFAC Chair to establish and communicate the hearing schedule.
14. Present to SUFAC all Spending Review results.
15. Complete other duties as requested.

**COMPENSATION:** Hourly pay rate

**REMOVAL:** Removal of the person serving in this role can be initiated by the SUFAC Advisor. The SUF Intern will be expected to meet basic standards established by UWW student employment guidelines and supervisor expectation.

## ADDENDUM C

### **SUFAC ALLOCABLE PROCEDURAL POLICY (Addendum C)**

#### **Committee Related**

1. The SUFAC membership is established prior to exam week each spring. Organizational meeting and training must be completed prior to the first day of exams. IF a new member of the committee is appointed mid-term, the SUFAC Leadership and Advisor are charged with implementing required training for the new member(s).
2. The voting members of SUFAC represent the following constituencies: 1 from each of the Whitewater campus colleges including Graduate Studies (5 total), and 3 WSG representatives (one year, two-year appointment and a Presidential appointment).
3. The Leadership of SUFAC is elected during the spring semester for the following year.
4. Any member who has more than two unexcused absences from SUFAC meetings may be brought up by the chair for removal. Any SUFAC member may petition for removal of another SUFAC member based on alleged misconduct. Any removal vote must pass a two-thirds vote of the SUFAC.
5. Appointed members of SUFAC serve at the purview of the appointing authority until the completion of Spring Training. After that point in time, the appointment may be removed from SUFAC by the appointing authority petitioning SUFAC to take a removal vote. Any removal vote must pass a two-thirds vote of SUFAC.
6. The SUFAC will generate a monthly report including all actions of the committee. Reports will be presented in person or provided via email ([wsgspeaker@uww.edu](mailto:wsgspeaker@uww.edu)) on a monthly basis.
7. The SUFAC must allow at least 5 weeks for groups to request funding.

#### **Decision Making**

1. The SUFAC reserves the right to request approval of funding policies at any time to WSG, prior to them going into effect. SUFAC Policy may not be changed once the budget process has begun. The only exception is by a four-fifths vote of the WSG Senate to suspend Allocable Procedural Policy. If a change is made, all student organizations and departments must be notified in writing within 48 hours of the approval of the change(s).
2. Annual Budget & Carryover requests are due by specified annual request date. Carry Over requests can be made at any time up until the Annual Budget deadline.
3. The SUFAC will create a detailed record of all student fee funding deliberations. They are subject to Open Records requests.
4. Student organizations which are denied funding will be provided, upon written request, a written statement of reasons for denial.
5. The SUFAC has the authority to deny requests or place conditions (stipulations) on expenditures of allocations in their recommendations.
6. Organizations requesting SUF and seeking placement on the SUFAC hearing schedule must contact the SUFAC Intern([sufac@uww.edu](mailto:sufac@uww.edu)) by no later than noon on the first day of SUFAC hearings.

7. Organizations who have met the hearing scheduling deadline are allowed to reschedule their hearing through the SUFAC Intern (sufac@UWW.edu) before the time of their hearing. The hearing may be rescheduled only if there are open time slots.
8. Funding seeing groups that do not complete a hearing may not be funded.

#### **Approval/Revision**

1. The SUFAC actions are reported to the WSG Senate. A 2/3 vote of the WSG Senate is required in order to adjust an allocation recommendation of the SUFAC.
2. SUFAC will present their recommendations at a WSG meeting agreed upon with the WSG Speaker. At the following meeting changes or adjustments may be made by WSG by a  $\frac{2}{3}$  vote. During the week of the process, a motion to reconsider may be entertained by a Senator.

#### **Use of Funds**

1. Individual organizations allocable student fee monies from one fiscal year will not be carried over into another fiscal year without the SUFAC consent. Carryover balances under \$100 will automatically be carried over. A revised budget may not be required.
2. Organizations are not allowed to give SUFAC funds to other organizations, without the approval of SUFAC.
3. Segregated University Fees may not be used to support any homecoming activities. (Exception: Homecoming Steering Committee)

#### **Expenditure/Revenue Related**

1. Organizations receiving SUF monies should keep records, documents, and receipts for possible audits.
2. For all SUF funded events, organizations must initially use generated revenues to reimburse the SUF account. Any other revenues are available to the organization for their own use (UW System Policy 820).
3. Organizations must publicize the SUF fee fiscal support of activities through notation on publicity for events.

#### **Travel, Food Expense Related**

1. Each year SUFAC will communicate to all campus partners with the invitation to request funds that funding requests for the following year should be based on a specific list of estimated expenditure amounts for travel related expenses (e.g., hotel room per night, per day for car rental, food allowance per person, miscellaneous per day as well as direction regarding allocation guidelines that the SUFAC will be using.)
2. Food/Beverage costs can be paid from SUFAC allocations when specifically requested in the budget approved by SUFAC. (Please indicate if it is a reception, a meal, or an entertainment contract.) as allowed by University and UW System policy.
3. Below are the guidelines to be followed when creating a budget for Allocable Budget presentations. Specific numbers are guidelines and may be adjusted each year and on a per organization basis if it is a crucial part of the organization and value to campus. Specific details

must be provided with the organization's budget request. The form will be reviewed each year prior to sending out to requestors and will have built in formulas to assist. The Budget office will also review prior to the request process beginning.

**Example guidelines for spending. Each fall, actual information will be approved by the Whitewater Student Government and shared with applying organizations prior to availability of application.**

<b>Budget Line</b>	<b>Example Guideline</b>	<b>Notes / Criteria</b>
<b>Travel (Purpose):</b>	Up to \$250 per event registration per stud. No overnight travel if within X hours driving distance and if event is between 9a-7p	Open eligibility to attend Supports the mission of the organization Purposed for organization's member growth Attendance brings benefit to the broader campus community
<i>Mileage</i>	38 cents per mile, per vehicle Bus guideline	Must carpool if possible and following university guidelines Keep in mind liabilities
<i>Lodging</i>	\$100 per room per night (over if you only have one person going) State rate for one person. \$100 for two or more, up to 4 people per room.	It is assumed to budget for 3-4 students per room Keep in mind the comfort of the students
<i>Food</i>	\$30 per day / person	Supports \$10 per meal (3 meals) Must keep receipts Other food expenses will be covered with student's personal money (not contingency)
<b>Maintenance:</b>	Detail must be provided by the organization on what is being maintained, and the annual cost to maintain.	Monies are to be used for fixing or maintaining already owned equipment by the student org. Repair must support the group's mission. The repair will continue the experience of the org or expand. Upkeep what the organization has already established. Purchases/upkeeping must stay within the organization.
<b>Supplies:</b>	Details must be provided by the organization on what the supply costs are.	Supplies to be kept within the organization Detail should be provided on how this benefits the organization
<b>Equipment:</b>		Expands the organization and its purpose. Gives more students opportunities.
<b>Programming</b>	Speakers/program: Sufficient detail and research has been done and is provided to the committee.	Speaker/program must be available to the public and does not restrict entry. Have to go through catering if food is being provided at or around the event.
<b>Services / Food:</b>	Food: 2 events at \$100 per event. The event must be open for the campus.	Food must be provided in a manner that is open to all students and not restricted by membership
<b>Utilities:</b>	Annual consistent utility fee (ex: phone line, online program fee)	Specific detail must be provided on cost per year, per utility item (ex: 3 phones x \$--- per phone)
<b>Fellowships:</b>	Detail on what value the fellowship dollars bring to campus, and descriptions of duties within roles	Must be essential to organization function / have significant campus/community-wide value

**Exceptions to any of these policies must be specifically approved by the full Segregated University Fee Allocations Committee and communicated in writing to WSG at time of approval.**



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**SUFAC Chair- Matthew Schweinert**  
**WSG 1-year Appointment**

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**WSG President- Davin Stavroplos**

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**SUFAC Vice Chair- Colin Chapman**  
**WSG Presidential Appointment**

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**WSG Vice President- Allyson Weisbrod**

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**SUFAC Vice Chair of Ed Outreach- Ben Larson**  
**WSG 1-year Appointment**

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**WSG Speaker- Justin Wesolek**

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**SUFAC CoBE Representative- Emily Burke**

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**SUFAC Advisor, Kim Clarksen**

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**SUFAC CoEd&P Representative- Matt Hanley**

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**SUFAC Advisor, Budget Office- Trisha Barber**

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**SUFAC CoLS Representative- Rahenya Anderson**

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**WSG Advisor- Jan Bilgen**

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**SUFAC CoGS Representative- Greta Wollmer**

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**Interim Vice Chair of Student Affairs- Frank Bartlett**

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**SUFAC CoAC Representative- Vacant**

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**Interim Chancellor- John Chenoweth**