KUSSI’S
STUDENT GUIDE
2013-2014
## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>KUSSI Description &amp; Services</td>
<td>2</td>
</tr>
<tr>
<td>What is Your Organization's Status?</td>
<td>3</td>
</tr>
<tr>
<td>Registering Your Organization</td>
<td>4</td>
</tr>
<tr>
<td>Student Organization Status &amp; Privileges</td>
<td>4 – 6</td>
</tr>
<tr>
<td>SGA Vehicles</td>
<td>7</td>
</tr>
<tr>
<td>Banking Services</td>
<td>8-9</td>
</tr>
<tr>
<td>Purchasing Services</td>
<td>10</td>
</tr>
<tr>
<td>Check Requests</td>
<td>11-12</td>
</tr>
<tr>
<td>Check Request vs. Purchase Order/Gift Card Purchase</td>
<td>13</td>
</tr>
<tr>
<td>KU Dept. Reimbursements/Food Purchases</td>
<td>14</td>
</tr>
<tr>
<td>End of Academic Year Considerations</td>
<td>15</td>
</tr>
<tr>
<td>SGA Budget Process</td>
<td>16-17</td>
</tr>
<tr>
<td>Capital Purchases/Special Funding</td>
<td>18-19</td>
</tr>
<tr>
<td>Frequently Asked Questions</td>
<td>20-21</td>
</tr>
<tr>
<td>Additional Funding</td>
<td>22-24</td>
</tr>
<tr>
<td>Event Services: Contracts, Cash Boxes</td>
<td>25-26</td>
</tr>
<tr>
<td>Quick Reference Guide (Budget vs. Private)</td>
<td>27-28</td>
</tr>
<tr>
<td>SGB Budget &amp; Finance Policies &amp; Procedures</td>
<td>29-30</td>
</tr>
<tr>
<td>SGB Budget &amp; Finance Infraction Policy</td>
<td>31</td>
</tr>
<tr>
<td>Contact Us</td>
<td>See Last Page</td>
</tr>
</tbody>
</table>

Contact Us ........................................................................... See Last Page
Who is KUSSI?

KUSSI is a non-profit corporation operated exclusively for charitable and educational purposes. KUSSI works closely with the Student Government Board (SGB) to provide free and low cost services for students and student-led organizations at Kutztown University. All services are made possible through the careful management of the student activity fees and proceeds from auxiliary operations. KUSSI receives no subsidies of any kind and contributes the majority of its proceeds to student organizations, cultural and capital improvement projects, scholarships and campus athletics.

What accounting services does KUSSI provide?

» Banking Services – Open Accounts & Accept Deposits
» Purchasing – Purchase Requests & Purchase Orders
» Check Requests – Check Requests & Vendor Payments
» SGA Budget Process – Initial SGA Budget Request
» Additional Funding – Budget Allocation Changes, Scheduling Budget/Finance Committee Meetings
» Special Funding – Remaining Budget Funds for Special Purchases
» Event Services – Vendor Contract Approval, Cash boxes
What is your organization’s status?

SGA GOLD STATUS
The highest level of status available to a student organization, SGA Gold Status, enables an organization to request funding from the Student Activity Fee by participating in the SGA Budget Process. Once an organization has been approved by the Student Government Board (SGB) for SGA Gold Status, the organization receives Gold Status privileges which include all privileges available to student organizations (1 - 10).

SGA MAROON STATUS
The second highest level of status available to student organizations, SGA Maroon Status, enables organizations to develop their mission statements and bylaws, take another step towards SGA Gold Status, and to receive increased privileges. Maroon Status privileges also include all privileges available to registered organizations (1 - 8).

REGISTERED
All Student Organizations on campus are required to register with the Office for Student Union & Involvement Services. Registered student organizations are entitled to many privileges (1 - 6).

STUDENT ORGANIZATION STATUS PRIVILEGES
10. Use of SGA funds as allocated by SGB during the SGA budget process.
9. Use of “SGA Gold Status” designation in communications.
8. Use of “SGA Maroon Status” designation in communications.
7. Use of SGA-owned equipment and resources including SGA vans, MSU copy machine, fax machine and SGB office telephone.
6. Use of the University’s name in promotional materials and posting those materials in accordance with University Policy.
5. Access to University facilities for meetings and programs.
4. Use of Bulletin Boards, Activities Calendar, KUnited, and KU Daily Brief for advertising in accordance with University Policy.
3. Use of the campus mail services.
2. Participation in Campus Sales and Solicitation Process.
1. Use of KUSSI accounting services.
REGISTERING YOUR STUDENT ORGANIZATION

- To be recognized as an active student organization on the Kutztown University campus, all student organizations must register every academic year with the Office for Student Involvement (MSU Room 153).
- Registration consists of completing a Student Organization Signature Form. This form can be found in MSU 153, or on the KUNited website: [http://kunited.kutztown.edu/](http://kunited.kutztown.edu/)
- It is important to keep the Student Organization Signature Form up to date with current executive officers. If the signature on a check/purchase request does not match the signature on file, the check/purchase request cannot be processed.
- In addition to completing a Student Organization Registration form, student organizations are also required to register their organization on KUNited every academic year.

KUNITED

Kunited.kutztown.edu

- KUnited is an interactive website where student organizations can advertise campus-wide events on a virtual flyerboard.
- Any KU student has access to KUnited. To log in, students use their KU email address, and MY KU password.
- KUSSI will utilize KUnited to communicate with student organizations. Upcoming due dates and important documents will be posted on KUnited. KUSSI will also utilize KUnited to email student organizations.

STUDENT ORGANIZATION STATUS & PRIVILEGES

REGISTERED STATUS

- Any student organization that completes a Student Organization Registration form and submits it to the Office for Student Involvement (MSU 153) as well as registers their organization on KUnited, is then granted Registered Status.

PRIVILEGES FOR REGISTERED STATUS ORGANIZATIONS

- Use of the University’s name in promotional materials and posting those materials in accordance with University Policy.
- Access to University facilities for meetings and programs.
- Use of Bulletin Boards, Activities Calendar, KUnited, and KU Daily Brief for advertising in accordance with University Policy.
- Use of campus mail services.
- Participation in Campus Sales and Solicitation Process.
- Use of KUSSI accounting services.
APPLYING FOR SGA MAROON STATUS - FIVE EASY STEPS:

1. Once registered for fifteen (15) academic weeks, a student organization may apply for SGA Maroon Status by completing an SGA Maroon Status Application Form in the KUSSI Service Center. KUSSI then forwards this completed application and a copy of the student organizations mission statement and bylaws to the SGB Parliamentarian to be reviewed by the SGB Constitutions/Policy Committee.

2. The student organization president and advisor will receive a status letter within three (3) weeks of submitting their application to the SGB Constitutions/Policy Committee. This status letter will outline any necessary revisions to the mission statement and bylaws.

3. The student organization president has thirty (30) days to complete revisions and resubmit the mission statement and bylaws to the SGB Constitutions Committee.

4. Once all revisions are completed, the SGB Constitutions/Policy Committee will recommend to the Student Government Board that SGA Maroon Status be approved. Once approved by the Student Government Board, the mission statement and bylaws will be forwarded to the Student Affairs Committee and the University President for final approval.

5. The student organization will receive a final approval letter granting SGA Maroon Status, once all approvals have been secured.

PRIVILEGES FOR SGA MAROON STATUS ORGANIZATIONS

- Use of “SGA Maroon Status” title in communications.
- Use of SGA-owned equipment and resources including SGA vans, MSU copier, fax machine, and SGB office telephone.
- Use of the University’s name in promotional materials and posting those materials in accordance with University Policy.
- Access to University facilities for meetings and programs.
- Use of Bulletin Boards, Activities Calendar, KUnited, and KU Daily Brief for advertising in accordance with University Policy.
- Use of campus mail services.
- Participation in Campus Sales and Solicitation Process.
- Use of KUSSI accounting services
APPLYING FOR SGA GOLD STATUS - FIVE EASY STEPS:

1. Once SGA Maroon Status has been maintained for fifteen (15) academic weeks, a student organization is eligible to apply for SGA Gold Status by completing an SGA Gold Status Application Form in the KUSSI Service Center. KUSSI then forwards the completed application and a copy of the student organizations mission statement and bylaws to the SGB Parliamentarian to be reviewed by the SGB Constitutions/Policy Committee.

2. The student organization president and advisor will receive a status letter within three (3) weeks of submitting their application to the SGB Constitutions/Policy Committee. This status letter will outline any necessary revisions to the mission statement and bylaws.

3. The student organization president has thirty (30) days to complete revisions and resubmit the mission statement and bylaws to the SGB Constitutions Committee.

4. Once all revisions are completed, the SGB Constitutions/Policy Committee will recommend to the Student Government Board that SGA Gold Status be approved.

5. Once approved by the Student Government Board, the student organization will receive a final approval letter granting SGA Gold Status and the student organization treasurer may request a Budget by contacting the KUSSI Service Center to complete the necessary paperwork and schedule a meeting with the SGB Budget & Finance Committee.

PRIVILEGES FOR SGA GOLD STATUS ORGANIZATIONS

- Use of “SGA Gold Status” title in communications.
- Use of SGA funds as allocated by SGB during the SGA budget process.
- Use of SGA-owned equipment & resources including SGA vans, copier, fax & SGB office telephone.
- Use the University’s name in promotional materials and posting those materials in accordance with University Policy.
- Access to University facilities for meetings and programs.
- Use of Bulletin Boards, Activities Calendar, KUnited, and KU Daily Brief for advertising in accordance with University Policy.
- Use of campus mail services.
- Participation in Campus Sales and Solicitation Process.
- Use of KUSSI accounting services.
**SGA VEHICLE ACCESS:**

- KUSSI has two SGA vehicles that may be used by Maroon & Gold Status organizations.
- THE VEHICLES CAN ONLY TRAVEL WITHIN A 50 MILE RADIUS outside of the Student Union Building
- If your organization must travel outside the 50 mile radius limitation, please contact a KUSSI Representative to obtain pricing for alternative vehicle rentals.

**PROCEDURE TO RESERVE AN SGA VEHICLE:** Please note: This is only a summary of the SGA vehicle policy. For additional information, please request a copy of the KUSSI SGA Vehicle Policy and Procedures addendum.

- Submit your driver’s license to the KUSSI office. Upon arrival you will be asked to complete a Motor Vehicle Report Release Form. This form authorizes KUSSI to verify the driving record of the requested driver.
- The MVR report typically takes two days to obtain results. If your driving record shows any of the violations listed on the SGA Vehicle Policy “Exhibit A”, you will be contacted and asked to find another driver.
- Utilize MapQuest, or a similar website that estimates the total travel miles. Multiply the total miles by the IRS Current Standard Mileage Rate. Effective January 1, 2013 the current mileage rate is 56.5 cents per mile. (Rate is subject to change).
- SGA vans are reserved on a first come, first serve basis. Your reservations cannot be guaranteed unless the following is submitted to KUSSI:
  - Submit a purchase request in the amount of the estimated mileage rate.
  - Submit a vehicle reservation form as soon as possible. SGA vans are reserved on a first come, first serve basis.
  - If using SGA budget funds to pay for the rental expense, a flyer advertising the event must be submitted.
  - Driver has approved MVR according to SGA policies.
- Completing all the above steps is the only way a reservation for use of SGB vans can be accepted and acknowledged.

**PROCEDURE TO RETURN SGA VAN AFTER USE.**

- Based on the SGA Vehicle Policy, KUSSI has implemented a van checklist in attempt keep to keep the vans clean.
- Upon return of a rented SGA van, a KUSSI staff member will utilize the checklist to ensure the van is returned in the same condition it was when it left the parking lot.
- If damages are indicated on the checklist, punitive measures will be assigned according to the SGA Vehicle Policy.
BANKING SERVICES

KUSSI provides banking services to all “Registered”, “SGA Maroon Status” and “SGA Gold Status” student organizations. All student organizations that collect or receive money are required to deposit and maintain these funds in the KUSSI Service Center. Student organizations are not permitted to open or maintain any off campus bank accounts. For more information, please refer to University Policy 1995-631 On-Campus Sales, Fund Raising and Solicitation and University Policy 1997-122 Collection of Funds.

SUMMARY: ACCESSING YOUR SGA BUDGET FUNDS

- The annual budget is derived from the student activity fee that every full-time KU student is obligated to pay as part of tuition.
- When your organization plans to utilize Budget funds to pay for expenses related to an event, it is important to advertise the event, trip, dinner, etc as far in advance as possible.
- Advertisements must be resources that every KU student has access to. Examples: Bear Essentials, The Daily Brief, KUnited, post flyers all around campus. Facebook, MySpace, etc. cannot be considered a resource because not every KU student is obligated to have a profile.
- When submitting a Purchase or Check request, the advertisement MUST be handed in as well to verify that the event was advertised, and open to all KU Students.
- Pizza will ONLY be permitted to be given away for free at guest speaker events.
- If the event is restricted to members of your organization only, Private account funds must be used.
- Giveaway items, promoting the student organization, as well as office supplies, must be intended to be used within the fiscal year in which they are purchased. Giveaway items can be defined as: pens, t-shirts, cups….etc. and are to be used for current year recruiting. Office supplies such as printer ink, binders, notebooks…etc. are to be used within the current year. Student organizations are expected to plan accordingly, throughout the fiscal year, to replenish supplies used and needed. We ask that your organization NOT stock pile on supplies that will be used in the following academic year.
- Student organizations are not permitted to use either budget or private account funds to purchase gift cards from vendors that sell alcohol or tobacco products. Paw passes can be purchased from the One Card office and used as giveaways at advertised campus-wide events.
- Approved gift card purchases must be used in the academic/fiscal year that they are purchased.

OPENING PRIVATE ACCOUNTS

- A private account may be opened by any “Registered”, “SGA Maroon Status” or “SGA Gold Status” student organizations.

- To open a private account, the organization's treasurer will need to bring all funds to be deposited into the KUSSI Service Center. At that time, a KUSSI Service Center staff member will open an account for the organization, establish a 3-digit account number and explain the procedures for depositing and withdrawing funds.

- Private accounts are used to deposit money from fundraising, donations, or any other source of funding unrelated to the Student Activity Fee. Private account balances carry over from year to year.

- Student organizations may spend funds from their private account on any purchase except alcohol, tobacco products or any illegal substances.
PRIVATE ACCOUNT STATEMENTS

- Account statements are also available upon request by a student organization's treasurer during KUSSI Service Center business office hours.

DEPOSITING FUNDS - FOUR EASY STEPS:

1. Complete Deposit Slip. Deposit Slips are located in the KUSSI Service Center and include the following information: date, organization name, name of depositor, source of deposit (i.e. fundraising, dues, other. This information is for your club’s future reference), account number, type of account (Private or SGA -Budget), cash total and/or check total.

Guidelines to follow when depositing checks:
- All checks should be made payable to KUSSI.
- All checks should include your club’s 3 digit account number on the upper left hand corner of the check.
- All checks should be deposited within 1 week of receiving them. If checks are held, there is an increased risk that once deposited; they may not clear the bank.
- In the event a check is returned from the bank we will notify the person who wrote the check requesting a replacement. We will also notify the club treasurer. If the person fails to replace the check within the time allowed the club treasurer will be notified again and the club may choose to take action against the student through the Office of Student Conduct Standards.

2. Verification of Deposit Amount. Please total the cash amounts and/or check amounts prior to submitting the deposit to a KUSSI Service Center staff member. The KUSSI Service Center staff member will count the cash and/or checks to verify the deposit amount. If the amount differs from the amount indicated, the staff member and the depositor will recount the money together to determine the accurate amount.

3. Deposit Receipt. Once the deposit amount has been verified, a receipt of the transaction will be given to the person making the deposit. If this person is not the organization's treasurer, he/she should forward this receipt to the organization's treasurer.

4. Account. Deposits will be entered against the student organizations’ account within 24 hours.
PURCHASING SERVICES

MAKING A PURCHASE - THREE EASY STEPS:

1. **Complete a Purchase Request Form.** Purchase Request Forms are available in the KUSSI Service Center and include the following information:
   - Date
   - Organization’s Name
   - Organization’s Treasurer’s signature
   - Organization’s Advisor’s signature
   - Account Number (and line item number)
   - Vendor/Individual’s Name & Address
   - Quantity, description, unit price, and total amount of purchase
   - Attach “back-up” paperwork which explains/details the purchase being made

2. **Creating a Purchase Order.** Once a properly completed purchase request form is submitted, a purchase order will be generated by a KUSSI Service Center staff member and be available for pick-up by the Student Organization within twenty four (24) hours. This purchase order will allow the organization to purchase tax-free items specified on the purchase order without having to pay for them immediately. **Purchase orders are only valid for 60 days from issued date.** All purchase orders not used within 60 days will be voided and cancelled.

3. **Please keep in Mind** that a purchase order is a guaranteed payment to a vendor. A purchase order sets a requested amount of money from your KUSSI account aside. Once you return the receipt from the vendor, any un-used money will return to your account.

   **For Example:** Your organization completes a purchase order in the amount of $100, but only uses $95, the remaining $5 will be returned to your account once the receipt is returned to the KUSSI Service Center Office.

   **If making a purchase from an outside vendor,** please be sure to ask them if they accept purchase orders. **Purchase orders are the preferred method of payment when making business transactions for your student organization.**
CHECK REQUESTS

DIRECT CHECK REQUEST WITHOUT A PURCHASE ORDER:

1. **Complete a Check Request Form.** Check Request Forms are available in the KUSSI Service Center and include the following information:
   - Date
   - Organization’s Name
   - Organization’s Treasurer’s signature
   - Organization’s Advisor’s signature
   - Account Number (and line item number)
   - Vendor/Individual’s Name & Address
   - Check Delivery Method
   - Quantity, description, unit price, and total amount of purchase
   - Attach “back-up” paperwork which explains/details the purchase
   - **NOTE:** If reimbursement is for food expenses, a detailed receipt must be obtained from the restaurant representing a full listing of food/beverage items purchased. Credit card summary receipt can not be accepted as proof of payment. Please be sure to request a detailed receipt BEFORE leaving the restaurant.

2. **Delivery Method.** Indicate to the KUSSI Service Center staff member, and/or on the check request form, the delivery method for the check requested. (E.g. mail to vendor/individual or hold in the office for pick-up). In the event the check is made payable to a student, staff or faculty member, only the person to whom the check is made payable to may pick up the check with a valid student identification card or driver’s license.

3. **Please Keep in Mind** that a check request is used for reimbursements, and only if a vendor does not accept Purchase Orders. The preferred method of payment to vendors is by Purchase Order.

4. **Check Availability.** Checks are created by the KUSSI Service Center on Tuesday and Thursday of each week, excluding holidays.
   - Complete/Accurate paperwork submitted by Monday at 12:00pm – Pick up check Wednesday after 8:00am
   - Complete/Accurate paperwork submitted by Wednesday at 12:00pm – Pick up Check Friday after 8:00am

Paperwork submitted outside these guidelines will be processed on the next check processing day. The KUSSI Service Center can not offer “same day” check creating services. It is important that pre-planning is considered to avoid any delays in payment to vendors/individuals. Checks will be available for pick up on Wednesdays and Fridays. Checks requested to be held for pick up will only be held for two weeks. After two weeks, the checks will be mailed.
CHECK REQUESTS

CHECKS CREATED FROM A PURCHASE ORDER:

Before any invoice or bill will be paid by the KUSSI Service Center, we must receive approval from the organization that the goods or services were received and the bill is OK to pay. This approval is confirmed by obtaining a signature of an organization officer or advisor, preferably with the phrase “OK to pay” on the invoice or bill.

1. **If the original bill was given to an organization member at the time of purchase,** it is the responsibility of that member to turn the bill in to the treasurer or advisor for approval. The approval may be written directly on the original bill and then must be turned into the KUSSI Service Center. The invoice will be processed for payment.

   Only original invoices will be used for payment. The KUSSI Service Center cannot pay invoices/bills that are not originals. If the organization wishes to keep an invoice for record keeping purposes, it must keep a copy and submit the original to the KUSSI Service Center.

2. **If the original bill is sent directly to the KUSSI Service Center from the vendor,** an e-mail will be sent to the organizations’ treasurer requesting them to stop by the KUSSI Service Center to “sign-off” on the invoice in order to authorize payment. If there is no response within 14 days, then a follow-up e-mail will be sent to the organizations’ treasurer, with a copy sent to the advisor, advising of the importance of signing off on the invoice to authorize payment. Once the invoice is signed then it will be processed for payment.

   By signing the purchase request, the Treasurer or other officer of the organization, authorizes payment to the vendor. Receipt of the goods or services must however be acknowledged before invoices can be paid. The advisor is able to acknowledge receipt of the goods or services on behalf of the organization. This allows invoices/bills to be paid after students have left the campus during breaks or over the summer or at any other time when an organization officer would not be available to approve the invoice/bill.

3. **If payment of the invoice/bill exceeds the purchase order amount,** follow the same guidelines as above, however, in addition the following will be assumed:

   Providing additional funds are available in the organizations account, once the original invoice/bill receives written approval for payment, the invoice/bill will be paid in full. Any additional amounts, above the original purchase order amount will be charged against the organizations’ account. It is the responsibility of the organizations’ Treasurer to reflect the additional cost on the organizations’ books.

4. **Check Availability.** Checks are created by the KUSSI Service Center on Tuesdays and Thursdays of each week, excluding holidays. Complete and accurate paperwork submitted by noon on Monday will be processed on Tuesday. Complete and accurate paperwork submitted by noon on Wednesday will be processed on Thursday. Paperwork submitted outside these guidelines will be processed on the next check processing day. The KUSSI Service Center can not offer “same day” check creating services. It is important that pre-planning is considered to avoid any delays in payment to vendors/individuals. Checks will be available for pick up on Wednesdays and Fridays. Checks requested to be held for pick up will only be held for two weeks. After two weeks, the checks will be mailed.
# PURCHASE ORDER vs. CHECK REQUEST

<table>
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<th>Purchase Order</th>
<th>Check Request</th>
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<tr>
<td>- Once all necessary paperwork is submitted to the KUSSI Service Center, the</td>
<td>- Once all necessary paperwork has been submitted to the KUSSI Service Center,</td>
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<td>completed Purchase Order can be picked up the NEXT day!</td>
<td>the reimbursement check can be picked up according to when the check request</td>
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<td>- The purchaser does not have to provide out-of-pocket money for club expenses</td>
<td>- A group member pays for club items with their own money, and later gets</td>
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<td>- All purchases are PA sales tax-exempt!</td>
<td>reimbursed with club funds.</td>
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<tr>
<td>- A club can submit a purchase order to a vendor as a guaranteed payment.</td>
<td>- The purchaser must pay PA sales tax. If requesting to be reimbursed for</td>
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<td>If there are items missing from the shipment, KUSSI can negotiate full</td>
<td>PA sales tax paid, the tax must be reimbursed with the club’s Private account.</td>
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<td>payment until the remaining items arrive.</td>
<td>- A club is obligated to pay for items before the vendor agrees to ship the</td>
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<td>order. Items may be shipped damaged, or missing, and it may be difficult to</td>
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<td>request a refund.</td>
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## GIFT CARD PURCHASES

- Approved gift cards may be used as prizes/giveaways at campus-wide events that are open and advertised to all KU students.
- Gift cards cannot be purchased for vendors that sell alcohol, tobacco or illegal substances.
- Paw Passes can be purchased with a KUSSI Purchase Order from the KU One Card office, and can be used at a variety of local vendors.
- If you are unsure whether a vendor sells alcohol or tobacco products, please contact a KUSSI Service Center representative.
- Gift cards must be used in the academic year in which they are purchased. DO NOT purchase gift cards at the end of the spring semester with intentions to use them in the following academic year.
- Gift cards cannot be purchased prior to an extensive trip with intentions on using the gift cards to purchase gas.
KU DEPARTMENTAL REIMBURSEMENTS

- KUSSI will no longer issue reimbursement checks to Kutztown University departments for the purchase of supplies, event expenses, travel expenses, etc that should have originally been paid for with club budget or private funds.
- University departments will no longer be permitted to purchase or pre-pay for a club related expenses and later have KUSSI reimburse the department with the club’s budget or private account funds.
- Student organizations must go through KUSSI directly to order supplies, pay event expenses, and pay for travel expenses, etc.
- Likewise, clubs may not use their budget or private accounts to pay for supplies, event expenses or travel expenses that should have been paid by Kutztown University directly.
- If club advisors are accompanying students and incur expenses that will be reimbursed by Kutztown University, the advisor must submit the expenses directly to the University. KUSSI will not reimburse the advisor then bill Kutztown University. Kutztown University will not reimburse KUSSI for expenses that should have been paid by the University initially.
- If assistance is required in completing transactions directly through KUSSI, please speak with a KUSSI Service Center representative.

FOOD PURCHASES FOR ON-CAMPUS EVENTS

- In compliance with the University dining service contract, KUSSI will no longer process purchase order requests in which food items are being purchased off campus with the intent of cooking and distributing such food items on-campus without the club first submitting the food request to dining services.
- Requests for catering at on-campus events must be initially processed through the University contracted dining service company. That dining service will have the “Right of First Refusal”. Please submit your request for food service by going to www.kutztown.catertrax.com. You will want to make dining services aware of the amount you are able to spend on the items you want so they have complete information when reviewing your request. Please give dining services sufficient time to consider your request by submitting it at least 5 business days prior to the event.
- If the requested catering services are declined by dining services, the student organization may proceed with normal procedures to obtain food off-campus for their event. Please provide a copy of dining services refusal to provide service along with the purchase request you submit to purchase the food elsewhere.
- If the requested catering services are accepted by the dining service, the student organization will need to proceed with placing the order with the dining service company and obtain a purchase order to cover the costs associated with said order.
- If an event is held off-campus, there are no restrictions as to acquiring food.
- Pizza is the only hot food item that may be ordered off campus for an on-campus event. Other approved items include prepackaged items that do not require heating or refrigeration such as: chips, pretzels, and bottled or canned beverages.
- Beverages purchased for on-campus events should be Pepsi products.
END OF ACADEMIC YEAR CONSIDERATIONS

PLEASE BE ADVISED: Student Organizations are not permitted to buy items for the upcoming academic year with current year budget funds. DO NOT PLAN TO USE BUDGET MONEY AT THE END OF THE SPRING SEMESTER TO BUY ITEMS FOR THE FOLLOWING ACADEMIC YEAR.

• Items such as prize-giveaways, club promotional items, program supplies, and office supplies MUST BE ORDERED BY APRIL 1st. This deadline allows 6 weeks before the end of the academic year for items to ship, be received & paid for.

• Prize giveaways can be defined as: items to be given away, to any eligible student, at a planned student organization program, within the current academic/fiscal year, to encourage participation in the program.

• Club promotional items defined as, items including but not limited to: cups, pens, t-shirts…etc. Promoting the club for recruitment purposes.

• Program supplies for events to be held in the next academic/fiscal year must be purchased with budget funds received after July 1st.

• Office supplies defined as: items including but not limited to: printer ink, notebooks, pens…etc.

• Gift cards cannot be purchased at the end of the Spring semester with intensions of use during the following academic year.

• At the end of the semester, it is imperative that the organization treasurer be sure all requests for payments/reimbursements are completed prior to leaving campus. Once the student body adjourns for the summer, it is difficult for student organizations to complete regular business activity. Without an officer's signature on invoices or check requests, we are unable to make payment, even if the advisor approves the invoice. If you anticipate any year end activities, please get the paper work completed BEFORE you leave campus

• A “Summer Release of Authorization” form may be completed to allow the student organizations’ advisor to act on their behalf during semester breaks when officers are not available for written approval on purchase/check requests. This form can be obtained in the KUSSI Service Center and must be fully completed and submitted prior to any action being made. In addition, a new “Student Organization Registration” form would need to be completed and submitted to the Office for Student Involvement Services (MSU 153), taking effect after spring graduation. Without a “Student Organization Registration” form on-file, account access will be denied.

• Any purchase orders not used by June 15th will be automatically cancelled due to fiscal year end. If an invoice is presented, after the purchase order to cover its expenses has been cancelled, the invoice will be paid out of the new fiscal year budget beginning July 1st.

• Prepaid expenses will be paid out of the budget for the following year. Prepaid expenses include, but are not limited to: conference registrations, hotel accommodations, flight arrangements, etc. Prepaid expenses can be defined as expenses that have a benefit of booking early to obtain00 a discounted rate.
SGA BUDGET PROCESS

SGA BUDGET PROCESS FOR SGA GOLD STATUS STUDENT ORGANIZATIONS—FOUR EASY STEPS:

1. In late September, SGA Gold Status Student Organizations, that are registered with the Office for Student Involvement, will receive their SGA Budget Packets for the NEXT academic year’s budget requests. If your organization does not receive an SGA-Budget Packet in the mail, packets are available in the KUSSI Service Center, MSU 171, as well as a PDF version available on KUnited.

2. In October, SGA Gold Status Student Organizations submit their completed Budget Packets to the KUSSI Service Center by the announced deadline. Standing Committees are required to attend a budget hearing with the SGB Budget Committee.

3. In November, the preliminary Student Organization Budgets are posted in the KUSSI Service Center for all student organizations to review. Student organizations may schedule a meeting with the SGB Budget Committee to discuss any concerns regarding the preliminary budget allocations.

4. In July, Student Organization Budgets are available for use for the new academic year. The final budget allocations are posted outside the KUSSI Service Center, MSU 171.

SGB BUDGET HEARINGS

- If, after a review of an organization’s submitted budget request, the SGB Budget Committee requires additional information, a member of the SGB Budget Committee will contact an officer of the organization requesting the information or to set up a meeting to discuss the request.

- Budget hearings are required only for those organizations listed as “Standing Committees”.

- Reminders will be given at the time of sign up listing the date, time and location of the budget hearing.
**SGA BUDGET PROCESS**

**BUDGET INFORMATION & HELP**

- Budgets are available to all “SGA Gold Status” student organizations and are provided to the organizations by the Student Government Association from the Student Activity Fee.

- Spending from budget funding must be used for the benefit of all students, the campus community as a whole and for the operation of the “SGA Gold Status” student organization.

- All “SGA Gold Status” student organizations receiving an SGA budget must keep their own financial records. These records are subject to review upon request of the SGB Treasurer, President, or Advisor.

- Budget funding **may not** be used to:
  - Fund groups whose membership is not open to all students who have paid the undergraduate student activity fee
  - Fund religious or political activities, charitable contributions, gift purchases, or events which are not sponsored by the University (Board of Governor Policy 1983-03A)
  - Pay for any goods or services that would violate Section 501(c)(3) of the Internal Revenue Code
  - Purchase items of equipment costing $500 or more with a life of two (2) or more years without special permission from SGB prior to the purchase being made
  - Pay for admissions to amusement parks (unless attending the park is consistent with the organization’s mission and statement of purpose)
  - Pay for meals or food for members (including meals at a conference or workshop, on fieldtrips, food or refreshments at regular meetings where no special event is planned)
  - Pay the salary of any coach
  - Front the cost of fundraising activities
  - Make loans to any other organization or club member
  - Reimburse individuals, students, faculty or staff for stolen, lost, or damaged personal property
  - Purchase clothing or items to be kept by club members
  - Purchase alcohol, tobacco products or any illegal substances

- Student organization monthly statements will no longer be mailed out monthly. Account balances/activity is available upon request. Please stop by the KUSSI Service Center, MSU 171.
CAPITAL EXPENDITURES

A capital item is defined as equipment where the item costs $500 or more, and the equipment has an effective life value greater than two years. If an organization would like to purchase a capital item with the current year's budget funds, the following must be completed:

- Schedule a meeting with the SGB Budget & Finance Committee. (KUSSI Service Center can help schedule the meeting). The SGB Budget & Finance Committee meetings conclude one week prior to finals; therefore, it is imperative that the student organization requesting a capital purchase schedule to attend a meeting prior to the conclusion of the meetings. A capital purchase request cannot be authorized without meeting with the SGB Budget & Finance Committee, and ultimately the request being approval by SGB.
- Drop off documentation pertaining to the capital item being requested to the KUSSI Service Center prior to the scheduled SGB Budget & Finance Committee meeting.

SPECIAL FUNDING

Special Funding is a specific type of request for funding made to the Student Government Board during the spring semester. Special Funding utilizes excess reserves to allow for purchases that would not normally be supported in an organization’s operating budget. Special Funding is dependent upon having excess reserves and is not guaranteed in any year.

TYPES OF SPECIAL FUNDING REQUESTS:

- Requests made to cover the purchase of a Capital Expenditure. A Capital Expenditure is defined as equipment where the individual item costs $500 or more, and/or equipment that can be used by the organization for at least two (2) years; or
- Requests made for special or unusual activities that would not be supported by the organization’s operating budget.

SUBMITTING A REQUEST - TWO EASY STEPS:

1. Special Funding Request Forms will be sent to all “SGA Gold Status” organizations via campus mail distribution, as well as be available in a PDF form on KUNited in the spring semester, to request funding for the next academic year.
2. Completed request forms are to be returned to the KUSSI Service Center by the deadline indicated. In order for the request to be considered, all necessary information must be included. Be sure to include the equipment or expense in as much detail as possible. It is advisable to attach copies of Brand names, model #’s, written quotes, product pamphlets, etc.
SPECIAL FUNDING PROCESS – SEVEN EASY STEPS:

1. The SGB Finance Committee reviews all submitted Special Funding Requests. If sufficient information is not provided on the request form, the SGB Finance Committee may contact the organization for more information, to assist in determining the importance of the request.

2. The SGB Finance Committee prepares and submits a prioritized Special Funding List to the Student Government Board for approval.

3. Once approved by SGB the Special Funding Prioritized List is forward to the KUSSI Board of Directors for their approval.

4. The prioritized list and available funding amount are sent to the University President for approval.

5. Once approved, all participating student organizations will be notified of the status of their Special Funding Request.

6. In August (after completion of the annual audit), the amount of remaining funds available for Special Funding is determined. If the amount of available funds is less than the total amount needed, then funding is provided based on the priority list. Any requests that cannot be funded may be resubmitted to the next academic year’s Special Funding Process.

7. Student organizations receiving funding should proceed following the normal purchasing process.
FREQUENTLY ASKED QUESTIONS

How may our organization spend Special Funding that has been awarded to us?

Special Funding is awarded for the specific equipment or activity as submitted on the original request and approved by the Student Government Board. If an organization needs to modify their original request after final approval, a request for substitution must be made as follows:

1. Prepare a written request to the Student Government Board that includes a detailed explanation of the changes in your original request. This explanation should state why your organization no longer needs to make the approved purchase, a description of what new item is being requested and why purchasing this item is more important than your original requested item. It is important to attach as much information as possible describing the new item.

2. This request must be signed by both the treasurer and advisor and should include both phone numbers and email addresses.

3. Bring the request and a copy to the KUSSI Service Center to be scheduled to attend an SGB Budget & Finance Committee meeting.

4. At the SGB Budget & Finance Committee meeting, be prepared to answer questions regarding the newly requested item.

5. The SGB Budget & Finance Committee will request that you attend an SGB meeting to answer questions from the entire Student Government Board and to receive approval.

6. If the substitution is approved by the SGB, proceed with the purchase of the new item following the normal purchasing process.

What if a capital equipment item must be replaced and our organization cannot wait for next year’s Special Funding?

1. Prepare a memo to the SGB Treasurer.

2. Identify the equipment to be replaced (e.g. Manufacturer, model #, serial number, brief description).

3. Explain why it needs to be replaced as soon as possible.

4. Provide information about the new equipment you want to buy (e.g. Price, description of equipment, product specs, etc.).
FREQUENTLY ASKED QUESTIONS (Continued)

5. The more information an organization can provide the better. Identify how you would like to pay for the item:

   a. Request the cost from an additional allocation;
   b. Request to use money from your SGA account; or
   c. Request a combination of the above.

6. The memo must be signed by both the treasurer and advisor.

7. Bring the memo and a copy to the KUSSI Service Center to be scheduled to attend an SGB Budget & Finance Committee meeting.

8. At the SGB Budget & Finance Committee meeting be prepared to answer questions regarding the request.

9. The SGB Budget & Finance Committee will request that you attend the SGB meeting to answer questions from the entire Student Government Board.

10. If funding is approved, proceed with the normal purchase procedure outlined in the KUSSI policies and procedures.

11. If any part of the funding is provided from an additional allocation, it should be indicated at the top of the purchase requisition with the words “Additional allocation” in addition to any expense line that is being used in the area of the account/expense line section of the purchase request.
ADDITIONAL FUNDING

SEEKING ADDITIONAL FUNDS OR FUND CHANGES

- **Need more money?** - “SGA Gold Status” student organizations may find that the SGA Budget awarded to them is not sufficient for all the activities they would like to do during the academic year. The student organization may request consideration for additional funding by:
  - Obtain and complete an SGA Additional Allocation Form
  - See “Sign up for SGB Budget & Finance Committee meeting” below

- **No budget for current academic year?** - “SGA Gold Status” student organizations that did not participate in the annual budget process the previous academic year may request a budget allocation for the current academic year by:
  - Obtain and complete the SGA Budget Request Form
  - See “Sign up for SGB Budget & Finance Committee” meeting below

- **Need Money for a Conference?** – “SGA Gold Status” student organizations may request monetary assistance to attend a conference or workshop by:
  - Obtain and complete the Conference Funding Request form
  - See “Sign up for SGB Budget & Finance Committee meeting” below

SIGN UP FOR AN SGB BUDGET & FINANCE COMMITTEE MEETING

- SGB Budget & Finance Committee meetings are held weekly throughout the academic year.

- “SGA Gold Status” student organizations may stop by the KUSSI Service Center, MSU 171 to sign up to attend an SGB Budget & Finance Committee meeting.

- Student organizations must attend an SGB Budget & Finance Committee meeting to:
  - Request additional budget funds
  - Request funding to assist in attending a conference
  - Request a budget, if an “SGA Gold Status” student organization did not receive a budget during the regular Fall budget process

- Required forms and information must be completed and submitted to the KUSSI Service Center at least two days prior to attending the SGB Budget & Finance Committee meeting.
  - Pick up and return the appropriate forms in the KUSSI Service Center, MSU 171
  - Returned forms must include supporting documentation to justify the request
  - See the sections below to determine which form to use
ADDITIONAL FUNDING

SIGN UP FOR SGB BUDGET & FINANCE COMMITTEE MEETINGS (Continued)

- Forms used in connection with managing budget accounts include:
  - **SGA-Budget Packet**: used to request an annual budget in the Fall semester.
  - **Budget Request Form**: used to request an annual budget (when a request was not submitted during the annual budget process).
  - **Additional Allocation Form**: used to request additional budget money.
  - **Conference Request Form**: used to request additional funding to assist in the expenses related to a conference.

FORM DESCRIPTIONS

Additional Allocation Forms

- Complete the form including the reason for the request for more funding and as much supporting documentation/information as possible.
- The form must be signed by both the treasurer and the advisor.
- Return the completed form to the KUSSI Service Center, MSU 171 and schedule to attend an SGB Budget & Finance Committee meeting.
- Attend the SGB Budget & Finance Committee meeting to answer questions; attendance at the meeting is limited to two representatives from the student organization. Failure to attend a meeting will result in your request not being granted.
- If requested to do so by the Budget & Finance Committee, attend the Tuesday evening SGB Meeting to answer questions.
- Based on SGB approval of the Budget & Finance Committee recommendation, funds are awarded at this meeting.
- Any money awarded is accessed by filling out a purchase request and putting “SGB Additional Allocation” in the account/expense line area.
- Follow the normal purchase process outlined in the PURCHASING SERVICES SECTION above.

Conference Funding Request Forms

- “SGA Gold Status” student organizations attending conferences (multi-day events) or workshops (single day events) may apply for conference funding.
- The SGA Conference policy should be reviewed for guidelines.
- SGA Conference Request Forms are available in the KUSSI Service Center, MSU 171.
- Complete the form and attach all necessary information. Have both the treasurer and advisor sign the form.
ADDITIONAL FUNDING

FORM DESCRIPTIONS (Continued)

Conference Funding Request Forms (Continued)

- Return the form to the KUSSI Service Center and schedule to attend an SGB Budget & Finance Committee meeting.
- Attend the SGB Budget & Finance Committee meeting to explain the request.
- Attend the SGB meeting if requested to do so by the SGB Budget & Finance Committee.
- If SGB awards an allocation follow the PURCHASING SERVICES section to access the funding or complete a purchase request form and put “SGB Conference Allocation” on the account/expense line.

Line Change Forms

- Line Change – Some student organizations have several expense lines and have funding in one but need it in another. This is not a request for more funding, but rather it moves existing funding where it is needed within the existing student organization budget.
- SGA Line Item Change Request Forms are available in the KUSSI Service Center, MSU 171.
- Complete the form and have it signed by both the treasurer and advisor.
- Return the form to the KUSSI Service Center, MSU 171.
EVENT SERVICES

CONTRACTS

- The contract negotiation and approval process can take up to 2 weeks. Please plan your event accordingly.
- Student organizations/advisors are not permitted to sign a contract. The KUSSI Executive director signs contracts on behalf of student organizations.
- Student organizations that need to enter into contracts are encouraged to utilize a KUSSI Standard contract. A three-ply document is available at the KUSSI Service Center, MSU 171. A PDF version of the KUSSI Standard contract is available upon request.
- If the vendor has provided the student group with their personal contract, there is the possibility of errors that can potentially hold-up the contract approval process

STEP-BY-STEP CONTRACT PROCESS

1. Student organizations that need to enter into contracts with vendors are required to bring all pending contracts, along with completed check request forms, to the Office for Student Involvement, MSU 153 for approval at least 2 weeks prior to the date of the event.

2. Once the event contract is approved by the Student Involvement Office, the contract is reviewed for errors by KUSSI staff.

3. If errors are found, corrections are noted by KUSSI staff, and returned to the Student Involvement Office. The student organization will be contacted by the Student Involvement Office.

4. If there are no errors found, the contract is forwarded to the KUSSI Executive director to obtain a signature.

5. Once the contract is signed, payment will be processed based on the event date.

6. Students are not permitted to sign contracts. The KUSSI Executive Director signs contracts on behalf of students to ensure individuals are not legally bound to a contract.
CASH BOXES

CASH BOXES FOR FUNDRAISING

Cash boxes/bags may be requested by any registered student organization to offer a safe and secure location to store starting money for fundraising events.

HOW TO REQUEST A CASH BOX

- A “Cash Box Request Form” must be completed and returned to the KUSSI Service Center, MSU 171, at least twenty (24) hours prior to the fundraising event.

- The “Cash Box Request Form” will require the following information/signatures: organization name, event name/date/time, date requested/date returned, starting currency, currency denomination, signature of requestor, printed name of requestor, telephone number, e-mail address of requestor, treasurer’s signature, and advisor’s signature.

- A student organization is permitted to borrow a maximum of $100 (in the denomination that best suits their needs) to be used as starting money for fundraising events.

- The cash box may be picked up and dropped off during normal Service Center business hours (Monday through Friday 8am-4:30pm); however if the event is a late-night event, the cash box can be stored at the MSU information desk and retrieved the next morning and brought to the Service Center, by a member of your organization, for deposit.

- When the cash box is picked up, the “Cash Box Request Form” will be signed by the person picking up the cash box & starting money. This slip will serve as documentation that money and a cash box was received by the student organization with obligation to return those funds and cash box. The cash boxes will be identified using a cash box number.

- When the cash box is dropped off, starting money originally issued will be verified by KUSSI Accounting staff, as being returned and the “received of petty cash” slip will be destroyed.
**KUSSI Quick Reference Guide**

**Which to Use...Private Account or Budget Account?**

**Travel Excursion:** For expenses related to a travel excursion to be paid using SGA funding (Budget), the trip must be well advertised and must be open to all KU students (limitations on attendees are permitted).

- Food for trip: *Private*
- Gas Reimbursement: *Budget*
- Vehicle Rental (including buses): *Budget*
- Plane Tickets: *Budget*
- Hotel Room for Students: *Budget*
- Advisor expenses: *Private*

**Please Note:** KUSSI would be happy to assist you in making your hotel reservations, if a credit card is required.

- Contact a KUSSI team member to coordinate working together to make the reservation.
- Please note: The KUSSI credit card will only be used to HOLD the room.
- Complete a check request and submit the hotel confirmation as back-up.
- Some hotels will allow students to bring the check with them during the check-in process. Others will prefer that the check be mailed two weeks prior to your arrival. Please check with your hotel to be sure which method of payment is acceptable and give yourself ample time to plan and organize.

**Guest Speaker:** For expenses related to a guest speaker to be paid using SGA funding (Budget) provided the speakers’ event is well advertised and open to all KU students.

- Food for presentation: *Budget*
- Gift for speaker: *Private*
- Hospitality meal for speaker: *Budget*
- Meal for advisor: *Private*
- Meal for students: *Budget*
- Hospitality/Hotel Room for speaker: *Budget*
- Transportation for speaker: *Budget*
**Ticketed Event:** To request tickets to be sold at the information desk within the Student Union Building, a KUSSI Ticket Request form must be complete at least two weeks prior to the event.

- If you are planning to utilize **Budget** funds to cover expenses related to your event, **ALL PROFITS WILL BE AUTOMATICALLY DEPOSITED BACK INTO THE ORGANIZATION’S BUDGET ACCOUNT.**
- If you are planning to utilize the ticketed event as a fundraiser, **Private** account funds must be utilized for all expenses.

**Fundraiser:** **Private**

**Charity Event:** **Private**

**Political Event that supports a particular Party:** **Private**

**Group Membership Dues:** **Budget**

**Individual Membership Dues:** **Private**

*As always, please feel free to contact a KUSSI team member to discuss an upcoming planned event!*
1.0 Purpose
This policy describes the guidelines and procedures to be employed by Gold Status Organizations when using SGA funds.

2.0 Applicability and Scope
This policy applies to all Gold Status Organizations who use SGA funds.

3.0 Definitions
Terms are defined within this document.

4.0 Policy

4.1 Budget Process
4.1.1 Budgets turned in after the deadlines are subject to an initial deduction of 5% with an additional 1% deducted for each class day late. The deduction will be imposed on the proposed budget given by the Budget and Finance Committee.
4.1.2 Budgets will not be accepted later than five class days after the deadline.
4.1.3 No budget will be accepted without a “Detailed Cost List”.
4.1.4 If the Budget and Finance Committee finds items requested in a budget are the same items/events requested in last year’s budget, finds that no purchases were made for those stated items/events, the request may be denied.

4.2 Budget and Finance Committee Funding Polices
4.2.1 SGA Budget and Finance Committee will not provide funds for alcohol, tobacco products, or illegal substances.
4.2.2 SGA budgeted funds may not be used for any type of partisan political endorsement or activity, or for contributions to the campaign fund of any candidate for political office.
4.2.3 No direct or indirect contributions may be made from SGA budgeted funds to charities, or for individual charitable purposes.
4.2.4 SGA budgeted funds may not be used to pay University employees for services rendered to any student organization or individual student, or in payment for personal expenses incurred in the performance of such services if it might be considered as part of the employee’s professional duties.
4.2.5 No student organization may use their SGA budgeted funds to finance fundraising events.
4.2.5.1 Funds for expenses that are related to an organization’s fundraiser must come from the organization’s private account or personal donations.
4.2.6 SGA budgeted funds may not be used to pay for attendance of individuals at parties, banquets, socials, entertainment, or recreational activities not related to the purpose of the organization.
4.2.7 SGA budgeted funds may not be used to purchase any personal items that cannot be returned to the organization’s inventory for reuse by members.
4.2.7.1 Any items purchased with SGA budgeted funds must be kept in the organization’s inventory.
4.2.8 SGA will not fund personal membership, except in cases where one membership due will cover the benefits for all members of the club.
4.2.9 SGA will not fund items or activities that the Budget and Finance Committee considers University or departmental expenses.

4.2.10 SGA will not fund maintenance of equipment not owned by SGA.

4.2.11 No organization shall withdraw moneys in excess of its allocation.

4.2.12 SGA will not pay for advisor expenses relating to a conference and/or workshop.

4.2.13 SGA will not fund giveaways that do not directly represent the organization as a whole.

4.2.14 SGA funds cannot be used to purchase foods for use at general meetings without a keynote speaker or once a semester recruitment meeting.

4.2.15 Repairs to an asset that is greater than $1,000 in cost and extends the life of the asset is considered a capital purchase.

4.2.15.1 A capital purchase must be requested to allocate for through the Budget and Finance Committee.

4.2.16 The herein above listed policy is non-inclusive.

4.2.16.1 Final determination is made by the SGB: Budget and Finance Committee.
Title: SGB: Budget and Finance Infraction Policy

Revision: 5 - 9/22/09
Approved: SGB- 9/22/09

5.0 Purpose
This policy describes the infraction policy to be implemented on Gold Status Organizations when using SGA funds.

6.0 Applicability and Scope
This policy applies to all Gold Status Organizations who use SGA funds

7.0 Definitions
Terms are defined within this document

8.0 Infraction Policy

8.1 1st Offense: Educational Experience presented by the Student Government Board: Budget and Finance Committee
   8.1.1 Explain policy violated (infraction)
   8.1.2 Suggest ways not to violate policy

8.2 2nd Offense: Freeze Budget for two weeks
   8.2.1 After two weeks, the organization must return to Budget and Finance Committee to request for their budget to be unfrozen.
      8.2.1.1 Organization must restate the policy violated with adequate understanding
   8.2.2 Appeal Process
      8.2.2.1 Organization can present their case to the Kutztown University: Student Government Board after the Budget and Finance Committee has pronounced the proposed organization’s budget is to be frozen.
      8.2.2.1.1 No member of the Budget and Finance Committee will be permitted to vote during the appeal process involving the Student Government Board.
      8.2.2.2 Organizations have no more than two days to submit their appeal to the Budget and Finance Committee after budget freeze has been proposed.
      8.2.2.3 During appeal process, organization may only utilize 35% of their remaining budget to date.

8.3 3rd Offense: Freeze Budget for lesser of 15 academic weeks or end of fiscal year
   8.3.1 After the end of the lesser of 15 academic weeks or the beginning of the new fiscal year, the organization must return to Budget and Finance Committee to request for their budget to be unfrozen.
      8.3.1.1 Organization must restate the policy violated with adequate understanding
   8.3.2 Appeal Process
      8.3.2.1 Organizations can present their case to the Kutztown University: Student Government Board after the Budget and Finance Committee has pronounced the proposed organization’s budget is to be frozen.
      8.3.2.1.1 No member of the Budget and Finance Committee will be permitted to vote during the appeal process involving the Student Government Board.
      8.3.2.2 Organizations have no more than two days to submit their appeal to the Budget and Finance Committee after budget freeze has been proposed.
      8.3.2.3 During appeal process, organization may only utilize 35% of their remaining budget to date.

8.4 4th Offense: Suspension of Remaining Budget Effective Immediately until End of Fiscal Year (6/31/20XX)
   8.4.1 No appeal process involved
<table>
<thead>
<tr>
<th>Organization</th>
<th>Position</th>
<th>Name</th>
<th>Location</th>
<th>Phone #</th>
<th>E-mail</th>
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</thead>
<tbody>
<tr>
<td>KUSSI</td>
<td>Executive Director</td>
<td>Lisa Kowalski</td>
<td>MSU 173</td>
<td>(610) 683-4084</td>
<td><a href="mailto:kowalski@kutztown.edu">kowalski@kutztown.edu</a></td>
</tr>
<tr>
<td>KUSSI</td>
<td>Accounting Manager</td>
<td>Dawn Williams</td>
<td>MSU 171</td>
<td>(610) 683-4091</td>
<td><a href="mailto:dawillia@kutztown.edu">dawillia@kutztown.edu</a></td>
</tr>
<tr>
<td>KUSSI</td>
<td>Accountant</td>
<td>Diane Ruth</td>
<td>MSU 171</td>
<td>(610) 683-4843</td>
<td><a href="mailto:ruth@kutztown.edu">ruth@kutztown.edu</a></td>
</tr>
<tr>
<td>KUSSI</td>
<td>Accounting Clerk</td>
<td>Jessica Rahn</td>
<td>MSU 171</td>
<td>(610) 683-4090</td>
<td><a href="mailto:rahn@kutztown.edu">rahn@kutztown.edu</a></td>
</tr>
<tr>
<td>KUSSI</td>
<td>Student Services Coordinator</td>
<td>Matt Lowther</td>
<td>MSU 171</td>
<td>(484) 646-4338</td>
<td><a href="mailto:lowther@kutztown.edu">lowther@kutztown.edu</a></td>
</tr>
<tr>
<td>Office for Student Involvement</td>
<td>Director</td>
<td>Leah Casselia</td>
<td>MSU 153</td>
<td>(610) 683-1383</td>
<td><a href="mailto:casselli@kutztown.edu">casselli@kutztown.edu</a></td>
</tr>
<tr>
<td>Office for Student Involvement</td>
<td>Secretary</td>
<td>Diane Finsel</td>
<td>MSU 153</td>
<td>(610) 683-1383</td>
<td><a href="mailto:dfinsel@kutztown.edu">dfinsel@kutztown.edu</a></td>
</tr>
<tr>
<td>Office for Student Involvement</td>
<td>Asst. Director-Office for Student Involvement</td>
<td>Jenni Rach</td>
<td>MSU 153</td>
<td>(610) 683-1383</td>
<td><a href="mailto:rach@kutztown.edu">rach@kutztown.edu</a></td>
</tr>
</tbody>
</table>

| Student Government Board | Advisor     | Bob Watrous    | MSU 257  | (610) 683-1320  | watrous@kutztown.edu         |
| Student Government Board | President   | Nick Imbesi    | MSU 196  | (610) 683-4045  | nimbe920@live.kutztown.edu   |
| Student Government Board | Vice-President | Camden Delphus | MSU 196  | (610) 683-4045  | cdelp737@live.kutztown.edu   |
| Student Government Board | Treasurer   | Matt Assad     | MSU 196  | (610) 683-4045  | massa643@live.kutztown.edu   |
| Student Government Board | Secretary   | Kelly Ann Hedlund | MSU 196  | (610) 683-4045  | khedl516@live.kutztown.edu   |
| Student Government Board | Parliamentarian | Emily Theodore | MSU 196  | (610) 683-4045  | etheo016@live.kutztown.edu   |