Spring 2021 Student Organization Handbook

Fiscal Guidelines for the Expenditure of Student Activity Fees
Dear Student Leader,

Welcome from the Office of Student Life! We are excited that you have chosen to get involved in Baruch’s vibrant community. Your co-curricular experiences outside of the classroom will work hand-in-hand with your academic endeavors and aid towards your future success beyond Baruch. The Office of Student Life is dedicated to ensuring that you are exposed to a rich array of educationally diverse opportunities. To that end, we have put together a comprehensive resource to guide you in developing, shaping, and leading a successful student organization here at Baruch. We are committed to the future success of all of our student organizations and encourage all student leaders to utilize the many resources that our office provides. Be sure to check in with your Student Life Advisor, MyBaruch, and the Office of Student Life website, and stay tuned for continued opportunities throughout the year.

*The Informer*¹ will provide you with information needed to effectively and strategically manage your leadership role and provide basic guidelines and resources for your organization’s success. Due to Baruch’s remote learning as a result of the COVID-19 pandemic, the Office of Student Life has put together a special Spring 2021 edition of *The Informer* that must be followed during the upcoming semester. Please keep in mind that social distancing guidelines outlined by the Center for Disease Control, the State of New York and The City University of New York must be followed at all times, even if not explicitly outlined in each section. The Office of Student Life will reevaluate the following policies and create an updated Fall 2021 Informer based on updates and recommendations by the CDC, CUNY, and the State of New York.

We encourage you to be creative and think of new innovative ways to connect with your club members, recruit new students, and host virtual programs. The Office of Student Life is here to support your initiatives and offer guidance. If at any time you have any questions or concerns, feel free to reach out to your Student Life Advisor.

For additional resources and information related to COVID-19, visit the following websites:

Center for Disease Control: [www.cdc.gov/coronavirus](http://www.cdc.gov/coronavirus)
Baruch College Student Affairs COVID-19 Resources: [studentaffairs.baruch.cuny.edu/dean-of-students/covid-19-resources/](http://studentaffairs.baruch.cuny.edu/dean-of-students/covid-19-resources/)

Best wishes for a successful year and thank you for partnering with the Office of Student Life in your co-curricular journey.

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¹ *The Informer* is also available for download on the Student Life website and MyBaruch. For the latest updates, amendments, and changes please check our website or MyBaruch. The materials in this guide are meant to be a starting point. For specific questions, please be sure to follow up with your Student Life Advisor. It is the responsibility of Student Organization leadership to abide by the guidelines and policies contained within. Sections of this handbook have been developed using the policies and procedures noted in *The City University Fiscal Handbook for the Control and Accountability of Student Activity Fees* (1992).
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The Office of Student Life strives to develop the co-curricular college experience of Baruch students through a rich array of educationally diverse programs, opportunities for leadership and civic engagement, student organization development, and community building. Student Affairs educators experienced with enhancing and developing the Baruch student experience are available to work with you on your leadership journey.

STUDENT GOVERNMENT
Student governance is a crucial part of co-curricular life at Baruch College. Through their officers and committees, they oversee the granting of student organization charters and budgets. Student governments serve as student representatives to the faculty and administration within the College and, as a result, have an important role in creating and implementing policies that affect the College community, which in turn gives student organization leaders a voice in the decisions that impact student life. Student organizations work with the Office of Student Life and one of the two student governments: Undergraduate Student Government and Graduate Student Assembly.

- **Undergraduate Student Government (USG)** consists of nineteen senators elected at-large: four vice presidents, and fifteen representatives, as well as a president, executive vice president, secretary, treasurer, and two University Student Senate representatives. Elections take place during the spring semester.
- **Graduate Student Assembly (GSA)** consists of all duly enrolled graduate students at Baruch College. These students nominate and vote for the Board of Governors of the Graduate Student Assembly, which acts as an executive committee for the association.

BOARD OF DIRECTORS, BERNARD M. BARUCH COLLEGE ASSOCIATION, INC.
Undergraduate Student Government (USG) and Graduate Student Assembly (GSA) are fiscally responsible to the Bernard M. Baruch College Association, Inc., which is governed by a corporate Board of Directors. This board reviews and approves the annual budgets, budget requests, and policy decisions of the respective operating boards under its jurisdiction, listed below. There is student representation on each of these boards.

- **Communications Board** is concerned with policies and fiscal matters relevant to the student publications and broadcast facilities.
- **Athletics Board** recommends and provides oversight for the expenditure of student fees for athletic purposes.
- **Student Center Board** recommends policies and establishes rules and regulations governing the Student Center and its related operations and programs. It also provides fiscal oversight for matters associated with the operation of the Student Center and its programs.
- **Programming Board** reviews and recommends to the Undergraduate Student Government programs that will promote and cultivate educational and social relations among the students, faculty, and administrative staff of the College by providing a variety of high quality, robust, creative, and entertaining programs that appeal to diverse audiences.
- **Health Care Board** recommends and reviews health programs and activities for the Baruch student community in keeping with the overall mission of health prevention, education, and medical treatment.
**STUDENT SERVICES ACCOUNTING UNIT**
The Student Services Accounting Unit is responsible for processing all fiscal paperwork related to student organizations. All student organization budgetary expenditures are processed through the Student Services Accounting Unit. The Student Services Accounting Unit is located in NVC 2-185. Please reach out to your Student Life Advisor before contacting the Accounting Unit.

**CLUB HOURS**
There are limited classes scheduled on Tuesdays from 12:40 PM to 2:20 PM and no classes scheduled on Thursdays from 12:40 PM to 2:20 PM to enable students to participate in club life and co-curricular activities. Club hours are used for a variety of purposes such as weekly student organization meetings, lectures, and professional and social events.

**STUDENT ACTIVITY FEES**
All registered full-time and part-time students pay a student activity fee. For the 2020-2021 academic year, student activity fees are the following per semester:

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<td>Undergraduate Full-time fall/spring</td>
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<td>Undergraduate Part-time fall/spring</td>
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<td>Graduate</td>
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**MyBARUCH**
MyBaruch ([tinyurl.com/mybaruch](http://tinyurl.com/mybaruch)) is an online student organization engagement platform that helps student leaders and campus advisors streamline communication, market programs and activities, and build a stronger sense of campus community. MyBaruch is a great way to find out what student organizations on campus are doing. Once you log in the first time, you will need to set up your profile. After that, you can send messages to any of the 130+ organizations on campus, connect with other students with similar interests, see what's going on using the event calendar, and more!

Required Actions for Student Organizations on MyBaruch:
- Each Baruch student organization must register via MyBaruch as part of the annual activation process.
- All officers, members, and Advisors of student organizations will need to establish a personal MyBaruch account by logging in using their Baruch credentials.
- Student organizations are required to keep their current officers up-to-date on MyBaruch. Only those listed as officers will receive important information from the Office of Student Life.
- Student organizations hosting large-scale events must submit these events on MyBaruch. These submissions provide Student Life Advisors with important information about the organization’s events and provide other students with a calendar of large-scale events on campus.
- Various forms including contract requests, new student organization requests, and others are on MyBaruch.

Benefits of a Registered Student Organizations:
- Once you have an account and become an administrator for your organization’s website, you can then:
  - Develop and update your page.
  - Archive an unlimited number of documents, pictures and videos.
  - Maintain accurate member rosters and profile directories.
  - Edit event details on both organization-specific and campus-wide calendars.
  - Allow members to share events within their Facebook news feeds.
  - Survey members to collect feedback via polls and discussion boards.
  - Create a paperless interaction system by managing daily activities online.
In order to function on campus, a student organization must successfully register every year with the Office of Student Life on MyBaruch. Additionally, registered student organizations must also be chartered by the pertinent student government in order to be eligible for a budget. **Note that chartered student organizations are not necessarily registered. Student organizations must adhere to and follow college conduct policies and procedures**. Registered student organizations have access to the following resources:

**STUDENT LIFE ADVISOR**

Each registered student organization will be assigned an Advisor through the Office of Student Life. Maintaining a good relationship with your Advisor is crucial to your success as an organization. Your Advisor works closely with student government and all other departments on your behalf. Your Advisor’s approval is also needed for space reservation and certain fiscal items. We encourage you to set up a meeting with your Advisor to discuss plans for the upcoming year or if you have any questions or concerns.

**STUDENT ORGANIZATION BUDGET**

All registered and chartered student organizations will have access to their student government-allocated budget once they have registered and are approved by the Office of Student Life. Student organizations that have not completed the registration process will not be given approval.

**STUDENT ORGANIZATION MEETING SPACE**

Only registered student organizations are allowed to advertise meetings on MyBaruch, Baruch Club related newsletters, and Student Life social media pages. Meetings can be held virtually during the upcoming semester. We encourage you to use Zoom, Facebook Live, or Instagram Live. Please review with your Student Life Advisor if you’d like to use a different platform.

**CLUB SUITE**

During remote learning as a result of the pandemic caused by coronavirus (COVID-19), all club suite spaces are closed until further notice.

**LOCKER**

During remote learning as a result of the pandemic caused by coronavirus (COVID-19), all club suite spaces are closed until further notice.

**MAILBOX**

During remote learning as a result of the pandemic caused by coronavirus (COVID-19), club mailboxes are closed until further notice.

**MAILROOM**

Student groups will not be allowed to have items shipped to Baruch’s mailroom until further notice. If your group would like to award prizes and giveaways, you can ship directly to recipients.

- Please be aware of the shipping cost when budgeting for an event that has giveaways or prizes.
- Winners must be given the option to provide a shipping address. Do not contact any University office requesting a student’s personal contact information.

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2 All Baruch student members of Student Organizations and organizations must adhere to and follow the *Baruch College Code of Student Conduct*, Articles XV and XVI of the CUNY bylaws noted by the Board of Trustees of the City University of New York and *The City University Fiscal Handbook for the Control and Accountability of Student Activity Fees*. Please refer to the Baruch College website at [www.baruch.cuny.edu](http://www.baruch.cuny.edu) for further information.
Chartered student organizations must register with the Office of Student Life every semester. Registration for the Spring semester opens at the end of the previous Fall semester. To stay active, every chartered student organization must:

- Have both the president and treasurer attend a Baruch Officer Leadership Training Workshop (BOLT).
- Have both the president and treasurer complete SPARC, the online Title IX and Sexual Assault Training.
- Complete the Student Organization Registration process on MyBaruch, including an updated organization constitution and membership roster. Keeping these records updated ensures that your organization will not miss any important communication or information.
- Have both the president and treasurer submit signatures to the Student Services Accounting Unit.

Additionally, the Office of Student Life reserves the right to request a letter of support from any national or international organization that desires to have a chapter on the Baruch campus. If the organization is affiliated with a national or international organization, please provide information to the assigned Student Life Advisor on the organization’s response to COVID-19 and how the organization plans to work with collegiate chapters. The letter of support should include the following items:

- A statement on the organization’s letterhead that gives the student organization the permission to use their name.
- Contact information for the organization’s representative(s).
- Release of any archived documents or communications that relate to the development of the student organization at Baruch College.

REGISTRATION OF A GREEK-LETTER STUDENT ORGANIZATION

For student organizations that the Office of Student Life identifies as Greek-lettered, there are additional guidelines that must be followed in order to remain active. Note that only previously chartered Greek-Letter Student Organizations are eligible to register with the Office of Student Life. In order to successfully register:

- The organization must submit current membership rosters (noting all active and inactive members) to the Office of Student Life on MyBaruch. Once submitted, no new members can be added to these rosters without the written approval of the Dean of Students.
- The Office of Student Life will conduct a disciplinary check on the organization’s members and its activities in consultation with the Dean of Students Office.
- A letter of support must be provided by the National Affiliate on organizational letterhead.
- All members of Greek-Letter Organizations (Honor, Business, Service, and Social) must participate in mandatory training programs on anti-hazing, anti-bullying, and prevention of sexual harassment and sexual violence.

Following the registration period, Greek-Letter Organizations must adhere to any and all established Greek Letter processes and protocols including, but not limited to, conducting all activities of Baruch social Greek organization on the Baruch campus, unless a specific, prior exception is granted by the Dean of Students.

There will be no new membership intake process for social Greek Life Student Organizations until at least May 31, 2021 as noted in the “Baruch College extension of moratorium on pledging and rush activities” letter issued by Baruch College on May 8, 2018.

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3 No budget transactions, room reservations, meeting rooms or Club Suite keys will be issued until the entire registration process is complete.
Baruch students are visionary and entrepreneurial, and so it is no surprise that a number of new student organizations are started each year. It takes a lot of work to get a new organization running so make sure to verify if Baruch College has a similar organization registered with the Office of Student Life.

First, review the student organization directory found on MyBaruch and in the Office of Student Life. Your organization must be truly unique from other organizations on campus or else you will be asked to join an existing organization.

With student activities being moved to a virtual environment for Spring 2021, the new student organization process will also be conducted virtually.

Next, once you are convinced that your vision for a new student organization is unique, you will be asked to take the following steps:

1. Fill out the New Student Organization Request Form located on MyBaruch.
   - The New Student Organization Request Form will be available on Mybaruch starting the first day of classes, January 29, 2021, until February 28, 2021.

2. Once your New Student Organization Interest Form has been approved by the Office of Student Life, schedule a virtual meeting to speak with a Student Life Advisor. This conversation will help you understand the new student organization process. Each organization is different so we have developed a registration process that will meet the needs of your group.

3. Following the appointment, coordinate and fulfill the requirements noted in your application such as registration, co-sponsoring events, membership requirements, new organization documentation, and general interest meetings.
   - The registration of a new organization will be submitted on Mybaruch and include a constitution, officers, roster, mission, possible events, and more.
   - New Organization registration must be approved by the Office of Student Life before moving on to the organization’s first event.

4. Host General Interest Meeting
   - New Organization will host at least one general interest meeting virtually via Zoom and be marketed on Mybaruch as a club event.
   - Attendance of the event must be taken.

5. Host Event
   - New Organization will host a co-sponsored event with a registered organization on campus.
   - New Organization will host at least one event virtually via Zoom.
   - Attendance of the event must be taken and have increased attendance of 15% since the General Interest Meeting.

6. Host One Additional Event or General Interest Meeting
   - New Organization will host one additional event (co-sponsored) or General Interest Meeting.

7. Once you have fulfilled the requirements of the new student organization process, you will sit for a virtual interview with the Office of Student Life and USG/GSA to review your total application.
   - For Undergraduate organizations, new organizations will present virtually via Zoom.
about their organization.

- 10 members must be present and actively participate in the 10 minute presentation.

8. If approved, your organization will be chartered by the respective student government and become eligible for a budget.

New student organization applications are only accepted during a limited time period each semester. Please refer to Appendix D for deadlines.

Important notes:

- The Office of Student Life reserves the right to review applications and send them back for revision if the nature of your organization is in direct conflict with CUNY policies.
- Academic Honor Societies or any organizations that relate to a Baruch College academic department (e.g., History, Finance, and French) must have a Faculty Advisor in addition to a Student Life Advisor.
- Sports and adventure-related organizations may not be approved due to risk management and liability insurance expenses.
- All General Interest Meetings and Events must be done via Zoom.
- The General Interest Meeting or Event must be registered on MyBaruch like all other registered club events.
- Attendance must be taken for each General Interest Meeting or Event.
- Flyers and any marketing (Instagram, Facebook, etc.) information must be provided to Student Life Advisor.
- A Student Life Advisor must receive a Zoom link and attend 5-10 minutes of your event or meeting.
During Baruch College’s continued remote learning period student clubs and organizations are encouraged to plan, facilitate, and host activities in a virtual setting. We encourage you to be creative in how you engage members, recruit new students, and host virtual activities. The Office of Student Life is here to support you in any way we can during Baruch’s continued distant learning period.

Only student organizations officially registered by Baruch College, and whose president and treasurer have attended a BOLT Workshop, are eligible to host virtual events.

**HOW TO SUBMIT VIRTUAL EVENTS VIA MYBARUCH**

In an effort to increase engagement and student participation during distance learning, the Office of Student Life will be promoting club events in the weekly newsletter that is emailed to the Student Body. If you would like your organization’s event included in the newsletter, follow the instructions below to submit your event to MyBaruch.

Virtual Event Policies: In order to have an event count toward the Club Budget Process, Club Suite Lottery application, or the Bernie’s Awards, it must be registered on MyBaruch per the directions outlined below.

By adding your events to MyBaruch, you can increase awareness, track RSVPs and archive attendance. Only students designated as an officer on MyBaruch have the ability to add events. If you need administrative access, reach out to your E-board members or contact your Student Life Advisor. The steps for adding events are outlined below:

**Step One**
To add your event, first log in to MyBaruch. You can access MyBaruch by visiting [baruch.campuslabs.com/engage](http://baruch.campuslabs.com/engage). You can log in with your Baruch credentials. These credentials are the same as your login information for Baruch computers or WiFi.

**Step Two**
Navigate to your Action Center by selecting the Switchboard in the top right corner and clicking “Manage.”

**Step Three**
Once you’ve reached your Action Center, you should see your organization listed under “My Memberships.” Click your organization’s name.

**Step Four**
Now that you’re on your organization’s management page, select the toolbox icon in the top left corner. When the toolbox opens, click “Events” from the menu.

**Step Five**
This is where you can manage all of your organization’s events. To add an event, click the “Create Event” button in the top right corner. Now, simply follow the instructions in the Event Form.

**Step Six**
Once you submit all of your general event information you will be prompted with two options: “Complete Submission” and “Continue to Custom Fields.” You must select “Continue to Custom Fields” and answer the additional questions.
Important: All events for the Spring 2021 semester will be held virtually, so make sure to select the “Virtual Platform” option from the dropdown for the “How will you host your event? (select "Virtual Platform" below)” question. When selecting your platform please include all relevant information for your event. This includes links, platform handles, instructions to join and more.

Once you’ve submitted the form, your Student Life Advisor will receive notice to review your submission. If they have any questions or concerns, they will either message you on MyBaruch (you will receive an e-mail notification) or contact you directly. Please allow your Advisor 2-3 business days to approve all events.

VIRTUAL EVENTS SUBMISSION SCHEDULE

In order to have your event featured in the Student Life Newsletter you must submit the event on time. The Student Life newsletter is released every Friday during the semester. In order to have your event featured you must have submitted your event AND have it approved by your Advisor the Monday of the week the newsletter is released. Plan ahead and submit your events two weeks before you will need them advertised in the Newsletter in order to make sure you have enough time to have the event approved.

VIRTUAL EVENT REGULATIONS, SAFETY, TIPS & TRICKS

To keep our virtual events safe and to prevent unwanted event interference, please review the following tips:

1) Zoom Bombing Prevention: Be aware that sharing a Zoom meeting link publicly (website, social media) opens up the possibility for Zoom bombing. Only do so if absolutely necessary.
   a) Log into Zoom via the web interface and then click “Settings” from the left menu to access the settings listed below:
      i) Meeting Password: If you are hosting private meetings, password protections are on by default. Keep those protections on to prevent uninvited users from joining.
      ii) Limit Screen Sharing: Scroll down to “screen sharing” and under “who can share?” click “host only: then click Save.
      iii) Participant Management: Turn on “waiting room”. That way, the host can allow in participants who are invited and weed out uninvited guests.
      iv) Turn off other settings: turn off “join before host”, “file transfer”, and “allow removed participants to rejoin”.
   b) When in a meeting:
      i) If you want to remove a participant, click “manage participants”, hover over the participant and click “more”, then “remove”. If “allow removed participants to rejoin” was turned off in the settings, the participant will not be able to rejoin the meeting/event.
STUDENT ORGANIZATION VIRTUAL PROGRAMMING

It takes a lot of work, determination, and strategic thinking to be a successful student leader. Remember your Advisor is always an email, phone call, or virtual visit away from helping you sort out any and all situations. A student leader must excel at the following:

- Budget and financial paperwork
- Event planning and related policies
- Building community within your membership

PROGRAMMING

Programming at Baruch College follows the Wellness Wheel Model (Hettler, 1976); this model focuses on students’ development in the areas of physical, emotional, and mental wellbeing. All dimensions relate to and affect each other. The Wellness Model provides a template for a balanced approach to event planning on campus. The seven prongs of the wheel enable us to develop a strong community through both carefully planned programs and active interactions with each individual. Programs following this model should specifically and clearly follow, celebrate, expand, and practice the mission of your student organization. These are events that require considerable planning and teamwork. Speak with your Advisor for ideas and strategies when planning your programs using the Wellness Model.

The Office of Student Life staff is available to help you plan your events and answer any questions regarding formalities and paperwork. Every aspect of your prospective event including entertainment, audio/visual needs, refreshments, and your budget will be discussed in great detail with you to ensure that your event will be a success.

MANAGING YOUR EVENT

After you have completed the initial planning for your event, there are still many management tasks to accomplish in order for the event to actually happen—things to handle before the event, guidelines to follow on the day of the event, and important details to take care of after the event. You may find it helpful to create a checklist. Here are some important things to remember when managing your event:

BEFORE THE EVENT

Confirm Virtual Platform is Set Up and Secure

In order to have a successful event, make sure that all of your organization members are informed of all the guidelines that apply to your event (password, etc.). If you delegate tasks to other members, remember to follow up and make sure that all details are in order (e.g., marketing, guest speaker communication, back-up presenter, attendance, etc.).
Virtually advertise adequately
If no one knows about the event, no one will attend. Be creative, do something original to market your event. There are many resources and methods available to you for promoting your event. Plan ahead as many resources have deadlines for submitting advertising. All flyers, posters, newspaper or radio ads directed to the general public must be approved by the Office of Student Life. All virtual event advertising must be in good taste, contain the name of the organization sponsoring the event and contact information. Utilize social media platforms and the MyBaruch system to reach a larger audience.

Alternative methods of publicity:
- To advertise your event on WBMB Radio (Campus Radio Station), have an officer from your organization contact a representative from WBMB at wbmbgeneral@gmail.com.
- To purchase advertising space in The Ticker (Campus Newspaper), have a representative from your organization contact a staff member at editor@theticker.org.
- Registering your events in MyBaruch allows you to market your events to the campus community, send out invitations and track RSVPs, and allows members to share events within their various social media platforms. All large-scale events must be registered on MyBaruch.

ON THE DAY OF THE EVENT
Log on early
- No matter how well you plan an event, sometimes difficulties arise. Most can be resolved if they are discovered in time. Make sure to log on to the event early, check the virtual preferences for the event, review the set up of the virtual event, etc. in advance. If there is a problem, contact the Office of Student Life for assistance.

Plan accordingly
- All events must end at the stated end time, whether or not they start on time. Event end times may not be extended. Be sure to pay attention to the timeline of your event in order to plan accordingly for all event activities.

AFTER THE EVENT
Pay your bills
- Submit all receipts or reimbursement Payment Request Vouchers for your event to the oslcf@baruch.cuny.edu email or to your student government treasurer on the first business day after the event. Ensure that any contracted vendors or performers are paid. Do not submit incomplete paperwork.

Evaluate
- Great leaders are constantly learning from their experiences. Evaluating your event after it is over is the key to planning successful events in the future. Take time to think about your event: What went well? What would you do differently? What would you like to remember for next time? Review the event at your next organization meeting. Ask members for their feedback. Make notes and refer to them during your next event or pass them along to the next leaders. If you want help in learning to assess an event, please ask your Advisor!

GUEST ACCESS

GUIDELINES FOR GUESTS
- Virtual events primary audience is for Baruch College students. If attendance of virtual events exceeds desired amount, non-Baruch guests must first be removed.
- Student Activity Fee money should be used for the benefit of current Baruch students.
Baruch College celebrates a number of heritage and history months:

- Latinx Heritage Month (September)
- LGBTQ+ History Month (October)
- Black History Month (February)
- Women’s History Month (March)
- Asian Pacific-American Heritage Month (April)
- Caribbean Week (April/May)

Planning for these months begins at least 2 months in advance. If your organization wishes to sponsor a program during a heritage month/week, contact your Student Life Advisor immediately. They will be able to connect you with the Chair of the Heritage Month planning committee so that you can plan a successful event.

**VIRTUAL HERITAGE/HISTORY MONTH PROGRAMMING:**

- Each heritage or history month will conduct programming virtually and include a social media marketing plan in order to showcase the heritage month being celebrated.
- Student organizations and individual students are able to plan virtual events for the month via Zoom, or other social media platforms, with a goal of one committee hosted event per week.
- Social media engagement will take a leading role in the heritage or history month virtual programming, with the committees highlighting the population being celebrated.
One of the most important functions for a student organization is to obtain funding for programming. Below are some key facts you should know!

**Funding Source**
Student activity fees are the source for all student organization budgets. The funding is allocated through USG and GSA.

**Registered Organizations**
In order to access your organization’s funds you must register your club with the Office of Student Life. This must be completed every semester.

**Budget Proposals**
Budget requests are prepared and submitted during the spring semester for funds that will be used in the following academic year. Student organizations can receive a budget by emailing a proposal to their respective student government. Budget proposal forms can be found on MyBaruch!

**Collaborative Effort**
It is recommended that incoming organization presidents and treasurers prepare the annual budget for the following academic year. You can use the Office of Student Life as a resource.

**Budget Approval**
Organizations are notified of their approved budget amount for the following academic year at the end of the fiscal year in June. New student organizations go through a probationary period before they’re approved; during this time their student government can provide funding for their events.

**Budget Access**
Student organizations do not have access to their budget until the first day of the fall semester. In order to spend money, the club president and treasurer must:
- Complete Registration on MyBaruch
- Complete BOLT training
- Have a signature card on file

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Text version of Student Organizations Budget Fact Sheet
USING STUDENT ORGANIZATION BUDGET
One of the most important responsibilities of a student leader is how to effectively manage their organization’s budget and monitor all organization expenses. This section describes a variety of student organization purchasing procedures.

The complete guidelines for budgeting and expending student activity fees, as established by the Board of Trustees of The City University of New York and by the Bernard M. Baruch College Association, Inc., are known as the Fiscal Guidelines for the Expenditure of Student Activity Fees. Student organization officers are required to know these guidelines and will be held responsible for failure to adhere to them.

The pages in this section are designed to summarize the Fiscal Guidelines, and to offer them in a format that is easy for you to understand and utilize. They are not, however, intended to be used as a substitute for careful reading and understanding of the Fiscal Guidelines contained in this publication (appendix A).

READING AND UNDERSTANDING YOUR STUDENT ORGANIZATION BUDGET
Student organization budgets are broken down into two components: programs and lines.

PROGRAMS
These are the activities or the general types of activities that the student organization wants to do during the academic year (networking events, meetings, parties, etc.). In your budget, each program will be assigned a number and a name. Student organizations may submit names for programs.

LINES
Each program is broken down into specific budget lines. The common budget lines are listed below:

- **Contractual services (Cont.):** Guest speakers, performers, bands, DJs, honoraria, food servers, lighting/sound technicians, security, and bus rentals.
- **Refreshments (Ref.):** All catering/food purchases (including meal allowances for conferences).
- **Supplies (Sup.):** Office supplies, paper products (plates, napkins, cups, and utensils), decorations, flyers, posters, computer software.
- **Equipment (Equip.):** Any tangible item with a useful life of at least one (1) year.
- **Miscellaneous (Misc.):** Prizes, speaker gifts, awards, rental equipment, pins, printing (e.g., posters), postage, film rentals, conferences/workshops, transportation (e.g., airline/bus/railroad tickets, taxis), and hotel reservations.

**Loving Life Club (LLC)**

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Contractual Srvs.</th>
<th>Refreshments</th>
<th>Supplies</th>
<th>Equipment</th>
<th>Miscellaneous</th>
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<tr>
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<td>$150.00</td>
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<td>$75.00</td>
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</table>
MAKING CHANGES TO YOUR STUDENT ORGANIZATION BUDGET
Once you have received your organization’s annual budget from your respective student government, it is possible to make certain changes to the budget during the academic year. Every change requires the approval of the appropriate student government.

You cannot request changes to your budget until the organization president and treasurer have attended a BOLT workshop, completed SPARC, and completed your registration.

Prior to the end of the fifth week of the Fall semester, you may make changes to your organization’s budget programs on a line-by-line basis and resubmit a revised budget to the appropriate student government. Your revised budget must be equal to the total allocation of funding originally approved by the student government.

After the fifth week of the Spring semester, you may make changes (which are limited to 10% of the total budget) to your organization’s budget.

Requests to make changes to your budget from one line to another or between programs must be approved by the appropriate student government through the budget modification process. You may not make any changes until the appropriate student government has approved these modifications.

APPEALS
You are able to appeal to your respective student government for more money for program lines within your budget during the academic year. Please contact your respective student government for more information on their appeals process. Once appeal money has been granted and approved it cannot be used for any other purpose than the program and line originally appealed for.

SALES TAX
State and Local sales tax will not be paid or reimbursed on any items. If you would like to request a Sales Tax Exemption Certificate to make a purchase contact your advisor and provide them with the name and address of the vendor, a description of the desired purchase, and the name of the event the purchase is for. Your advisor will email you a tax exempt certificate within three (3) business days.

REIMBURSEMENTS
All reimbursements must be approved by the Office of Student Life prior to the purchase being made. Reimbursements, or vendor invoice payments, cannot be issued to a third party. All payments must take place during the academic year and can take 8-12 weeks to process. Please see page 20 for more information on reimbursements.

SPECIAL ITEMS
Due to CUNY purchasing policies, specific items may require additional approvals and processing. Items such as computer equipment and furniture require going through CUNY Purchasing. Please work with your Advisor regarding these items and if you have any additional questions.

GIFTS FOR PROFESSIONALS & SPECIAL GUESTS
Gifts for professionals and special guests must not exceed $25 in value. Gifts cannot be issued in the form of a gift card.
The City University of New York has implemented a centralized system for the management of student activity fee funds which are used for club and organizations budgets every academic year. This system requires approval of all purchases prior to the spending of any funds. In order to submit a request in the CUNYfirst system, clubs and organizations must first have an approved budget from their Student Government and/or the Baruch College Association Board of Directors.

**SUBMITTING A REQUEST**
In order to spend your organizations budget, you must first outline what you would like to spend the funds on by completing the Budget Spending Proposal Form on MyBaruch. Upon submitting the form, you will receive an email confirming your submission.

Once the submission to the Budget Spending Proposal Form is complete, your student government treasurer will do a budget check to ensure you have the necessary funds needed for the purchase. Once your student government treasurer ensures that funds are available, the Office of Student Life will submit a requisition to the CUNYfirst system on your organizations behalf. It is important for you to check your email frequently in case further information is required to complete the requisition. If your submission is complete, you will receive another confirmation email stating your requisition was successfully submitted into the CUNYfirst system.

**RECEIVING APPROVAL & RENDERING SERVICES**
CUNYfirst requisitions will be approved in approximately six to eight (6-8) weeks from the date that you receive confirmation from the Office of Student Life that the requisition was submitted. Only once approval from CUNYfirst is received can the vendor provide services. Approval from CUNYfirst is confirmation that the vendor is eligible to be paid for the services outlined in the original requisition or the contract, if one is in place. Once services are delivered, a receipt must be provided by the vendor as proof that services were rendered. Only then will the vendor receive payment.

**BUDGET SPENDING PROPOSAL FORM STEP-BY-STEP GUIDE**
In order to meet the timelines of the CUNYfirst system you must plan your events a minimum of six to eight weeks in advance. You may not make any club-related purchases, or receive services from a vendor, if you have not first received approval from CUNYfirst. If you receive services from a vendor prior to receiving approval, you run the risk of that purchase being denied, and not being able to pay the vendor.

Follow the steps outlined below to submit your club budget expenditures to the Budget Spending Proposal Form for approval. The form can be found on the MyBaruch platform ([www.tinyurl.com/mybaruch](http://www.tinyurl.com/mybaruch)) under the “forms” tab. **Make sure to complete the form designated to your organization type, there will be one form for undergraduate organizations and another for graduate organizations.**

1. With your e-board, review all expenses for events that you plan on hosting.
   a. Plan ahead (6-8 weeks) and outline the expenses for as many events as possible where you will be spending your club budget. **ALL events and expenses must be accounted for.**
      i. This includes, but is not limited to, the following:
         • E-gift cards (allowed for Baruch College students ONLY)
         • Customized items (pens, trophies, water bottles, etc.)
         • Contracts for speakers, DJs and more
         • Software
         • Website domains
         • Registration for virtual conferences, workshops and trainings
ii. If you plan on co-sponsoring with another organization, both organizations are responsible for submitting the CUNYfirst form outlining the expense that you will be co-sponsored. This is to allow funds to be retrieved from both club budgets for payment.

2. Submit your anticipated club expenditures using the Budget Spending Proposal Form.
   a. Some things to keep in mind:
      
      The person completing the form must be logged into the MyBaruch platform and should list themselves as the contact person.
      **Do not complete a form submission on behalf of someone else. Only the submitter of the form will receive email notifications on the status of the submission. In addition, please make sure to actively monitor your Baruchmail email account.**
      i. When completing the form, make sure that you include all of your club expenditures for that specific event. If you have more vendors for an event than allowed in a single form submission, submit additional forms until you have outlined all expenses.
      ii. Ensure that your vendor information is correct and is consistent with the information provided in the invoice and the CUNY Substitute Form W9. Incorrect information can lead to your request being denied or being significantly delayed.
      iii. Once you submit your Budget Spending Proposal Form, an email will be automatically generated confirming receipt of your request. Please note, a receipt of your request does not indicate approval. To view all submissions made, sign in to your MyBaruch account, click the circle icon on the top right of the homepage screen and select “submissions” from the drop down. There you will see a list of all form submissions made on the platform.
      iv. Be sure to review your previous submissions, and to keep other e-board members informed about your submissions, to avoid duplicates.
   b. Necessary documentation to submit with your form:
      i. CUNY Substitute Form W9
      ii. CUNY Payee Direct Deposit Form
      iii. Invoice that includes: vendor name, address, phone number, invoice number, invoice date, amount and description of the services being provided
      iv. Bid Form for purchases over $250.01
      v. Contract, if applicable
      vi. Memo, if applicable
      vii. Certificate of Insurance (COI), if applicable
      viii. List of students attending conference; include full names, emails and EMPL IDs
      ix. Event flyer(s)

3. Once you have submitted the form, you must wait to receive a confirmation email from the Office of Student Life that the request was submitted to the CUNYfirst system. The Office of Student Life will also inform you when the request is approved by CUNYfirst and services can be rendered.

4. Once services are rendered, make sure to submit your receipt to OSLCF@baruch.cuny.edu within two weeks of your event completion. Once the receipt is received, the Accounting Unit will process payment in two to five business days. A direct deposit/ACH check will be issued to any vendor that has completed the CUNY Payee Direct Deposit Form. A paper check will be issued to any vendor that has not completed the CUNY Payee Direct Deposit Form. No further paperwork is necessary after the receipt is submitted.

**CONTRACTS**

For vendors that require contracts, you must add another two weeks to your timeline to ensure that your advisor is able to have your contract created and signed by both the vendor and the College prior to submitting a request to the Budget Spending Proposal Form. Requests cannot be submitted to CUNYfirst without a signed contract available. See page 28 for further information on contracts.
Technology Purchases
Website domains, software, and other technology purchases must be approved by BCTC and CUNYfirst. **Extend your timeline by 3-4 weeks for a technology purchase.** Technology purchases include, but are not limited to:

- Website Domains
- Online Games
- Subscriptions to online technology services

Appeals and Co-sponsorships
In the case that your club does not have sufficient funds to make the purchase(s) necessary for your event, you are able to submit a co-sponsorship or appeal request to your student government. **Co-sponsorships and appeals must be requested and approved PRIOR to your organization making a submission to the Budget Spending Proposal Form.** This will ensure that your Budget Spending Proposal Form submission is not denied by your student government due to insufficient funds. **Add an additional two weeks to your timeline for events that require co-sponsorships, and an additional four weeks to your timeline for events that require an appeal approval.**

- For undergraduate organizations, see Appendix B for further information on appeals.
- For graduate organizations, contact the Graduate Student Assembly Treasurer at shani.batat@baruchmail.cuny.edu and the Assistant Treasurer at kishan.patel2@baruchmail.cuny.edu for further details.

REIMBURSEMENTS
During the distance learning period, it is possible that your organization will not be able to make a purchase using the CUNYfirst system. In these instances, you may have to make a purchase and be reimbursed. Each scenario must be evaluated on a case by case basis, and be approved by the Office of Student Life prior to the purchase being made.

To submit a request for reimbursement, you must complete the following steps:

1. Submit a Budget Spending Proposal Form within the six to eight week time frame required for CUNYfirst purchases.
2. Receive confirmation from your student government who will ensure the proper funds are available in the club budget.
3. Receive approval from the Office of Student Life to make the purchase for reimbursement.
4. Make your purchase.
5. Submit your documentation to your respective student government.
      i. To submit a program change, visit: www.bit.ly/ClubProgChange
      ii. To submit a line change form, visit: www.bit.ly/ClubLineChange
   b. For graduate organizations: Digitally submit all required forms with e-signatures to the Graduate Student Assembly at shani.batat@baruchmail.cuny.edu and kishan.patel2@baruchmail.cuny.edu.
6. You will receive a check in the mail within four to six weeks.
You must use a Payment Request Voucher for ALL reimbursements or purchases that are not processed through CUNYfirst. All Payment Request Vouchers require original signatures from the president and treasurer. Electronic signatures are allowed during Baruch’s distant learning period.

HOW TO PROCESS A PAYMENT REQUEST VOUCHER

Step 1: Make sure you have enough money available in the proper program and line of your student organization budget to pay for the purchase. You may not make purchases that do not appear in your approved budget.

Step 2: For undergraduate organizations: Complete the Google Doc Forms and upload all necessary documents to www.bit.ly/Club-PRV.
For graduate organizations: Download a Payment Request Voucher from MyBaruch or the Student Life website (the Student Clubs & Organizations Resources page). Scanned signatures on vouchers are not acceptable. All signatures must be typed directly into the PDF.

Step 3: Attach the following information to the completed Payment Request Voucher:
- Submit a separate Payment Request Voucher for each vendor/payee.
- Copy of the flyer, poster, or information sheet announcing the program. Make sure to include the name of your student organization, the location, date, and time of your program. If refreshments are being served, it must also be specified. If your organization is co-sponsoring this event with another organization and you are covering some costs, then your organization name and logo must appear on the flyer.
- Copy of “paid” receipt(s) and/or invoice from the vendor that specify the word “PAID.” Each receipt/invoice must include the name and address of the vendor/contractor, date, description of purchase, and amount. Kitchen checks/menus are not accepted as paid receipts. If the address is not included on the receipt, a business card must be attached for proof of location.
- Include completed wire transfer form. Please have company or individual complete form, so it can be included in final voucher paperwork.
- If personal checks are used, a copy of cancelled check is required (no more than $250 will be reimbursed).
- If credit cards are used, a copy of the credit card statement is required. If the statement does not list the full name or the account number then a photocopy of the credit card must be attached.
- As needed: payment requisition, approved contract.

Step 4: For graduate clubs only: Once the paperwork is completed, join all paperwork into one PDF document OR put all the documents into a folder. Label the PDF or folder as follows: <ClubName>_<PaymentVoucher#>, for example: OSL_OSL210.

Step 5: For graduate clubs only: Submit the payment paperwork to your student government treasurer. Make sure that the subject of your email is: <Club Name> Payment Vouchers, for example: OSL Payment Vouchers.
- Both president and treasurer MUST be included in the email and we are only accepting emails from baruchmail email addresses. No emails from Gmail or club-related email addresses will be accepted.

Step 6: The Student Services Accounting Unit will send payment via check to the vendor/payee if the Payment Request Voucher and attachments are complete and accurate.

Step 7: Student organization officers must maintain a record of all funds received and expended. Make sure you have copies of all organization expenses.
HOW TO FILL OUT A PAYMENT REQUEST VOUCHER

Name of your club or organization

Payable to:

Address:

Fiscal Year

Completeness and address of payee (Print legibly)

Check whether this payment is for a pre-bill, vendor invoice, or reimbursement

Date of purchase

Vendor invoice number and date

Brief description of the purchase item(s), including quantity

Club budget program and line to be charged

Amount

TOTAL AMOUNT:

APPROVAL FOR PAYMENT

Signature of club president

Signature of appropriate student government officer

Signature of club treasurer

FOR STUDENT SERVICES ACCOUNTING UNIT USE

Account Code

Amount

By:

Date

Check number
PURCHASE REQUISITION FORMS

You must use a Purchase Requisition form for any general purchase costing more than $250.01. If you have a contract, **ALL contracts must be accompanied by a Purchase Requisition form despite the amount.** See page 28 to learn more about contracts.

HOW TO PROCESS A PURCHASE REQUISITION FORM

**Step 1:** Make sure that you have enough money available in the proper program and line of your student organization budget to pay for the purchase. You may not make purchases that do not appear in your approved organization budget.

**Step 2:** Download a Purchase Requisition form from MyBaruch or the Student Life website (the [Student Clubs & Organizations Resources page](#)).

**Step 3:** Secure your bids from vendors (refer to page 26 for more information on bids).

**Step 4:** Choose a vendor. Your choice must be the lowest bid.

**Step 5:** Fill out the Bid Form. You can find this form on MyBaruch or the Student Life website (the [Student Clubs & Organizations Resources page](#)).

**Step 6:** Undergraduate Organizations: will complete the Purchase Requisition and Bid form using the Google Doc form found at: [www.bit.ly/Club-PRV](http://www.bit.ly/Club-PRV).

Graduate Organizations: Fill out the Purchase Requisition form. Attach your bid information to the form.

**Step 7:** Graduate Organizations: E-mail the completed Purchase Requisition form and attachments to your respective student government. Student government will contact the student organization if any questions arise.

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<thead>
<tr>
<th>Dollar Range</th>
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<tr>
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<tr>
<td></td>
<td></td>
<td>• No prior approval (unless it’s a contract)</td>
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<td></td>
<td></td>
<td>• No more than $2,000 to one vendor per month through this process</td>
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<td>$250.01 - $1,000</td>
<td>Payment Request Voucher</td>
<td>• Bid Form: 3 bids</td>
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<tr>
<td></td>
<td>Purchase Requisition</td>
<td>• Reasonable price: prior history or discount from retail price</td>
</tr>
<tr>
<td></td>
<td>Bid Form</td>
<td></td>
</tr>
<tr>
<td>$1,000.01 - $25,000</td>
<td>Payment Request Voucher</td>
<td>• Bid Form: 3 printed bids</td>
</tr>
<tr>
<td></td>
<td>Purchase Requisition</td>
<td>• Reasonable Price: prior history or discount from retail price</td>
</tr>
<tr>
<td></td>
<td>Bid Form</td>
<td>• Approval from Director of Student Life &amp; Baruch College Association Designee</td>
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<tr>
<td>$2,500.01 - $20,000</td>
<td>Payment Request Voucher</td>
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<td>Bid Form</td>
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<tr>
<td>Over $20,000</td>
<td>Payment Request Voucher</td>
<td>• Advertising and formal bid process</td>
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<td>Formal Contract</td>
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<tr>
<td></td>
<td>Bid Form</td>
<td></td>
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</tbody>
</table>

**Printed bids must be obtained via information from vendors over regular mail, printed emails, or by printed pages from the vendors’ websites. A response indicating no wish to bid is acceptable.**
# HOW TO FILL OUT A PURCHASE REQUISITION FORM

![Purchase Requisition Form](image-url)

## Instructions

1. **Name of your club or organization**: Enter the name of your club or organization.
2. **Vendor Name & Mailing Address**: Provide the name and address of the vendor.
3. **Deliver To**: Specify the delivery location.
4. **Special Instructions**: Include any special instructions if applicable.
5. **Item #**: Enter the item number.
6. **Description**: Provide a detailed description of the item(s) being purchased, including model numbers if appropriate.
7. **Quantity**: Specify the quantity of the item.
8. **Unit Price**: Enter the unit price of the item.
9. **Total**: Calculate the total price by multiplying the quantity by the unit price.

## Conditions

- **No change may be made in any of the provisions of this purchase order without a written memorandum of change issued by the Bernard M. Baruch College Association, Inc.**
- **Submit invoices in triplicate to above address.**
- **Purchase order number must appear on each package and invoice.**

## Notice

- **The Bernard M. Baruch College Association, Inc. is NOT subject to NYS and Local Sales and Use Tax on purchases. NYS Form ST-119.1, Exempt Organization Certification, is available upon request.**

## Signatures

- **Signature of club president**
- **Signature of club treasurer**
- **Signature of person receiving delivery**

## Approved by

- **FOR OFFICE USE**

- **Account Code**: Enter the account code.
- **Amount Encumbered**: Enter the amount encumbered.
HOW TO FILL OUT WIRE TRANSFER FORM

Wire Transfer Transaction Form

Instructions: Include below all information needed to initiate a Wire Transfer. This form is required to complete all wire transfer payments. Complete all of the fields below, incomplete forms will not be processed for payment. Please note that this document is for personal and urgent reimbursements.

- Name of your organization
- Payable to
- Event Name
- Payment Voucher #
- Bank Name
- Bank Routing #
- Account Name
- Account #
- Reference

For any additional important information or to help identify TWF with corresponding paperwork.

Name of individual or company receiving payment

Corresponding voucher number found on PRV.

Individual’s or vendor’s bank information.
**ADDENDUM FINANCIAL FORMS**

**Appeals Form:** Used to request additional funds from student government for an existing program or new program. Amount being requested must equal to $500 or more, and is subject to approval by your student government.

**Bid Form:** Used as price quotes from vendors. Three bids are needed if expenditures are $250.01-$1,000.00, three printed bids will be needed if expenditures are $1,000.01-$2,500.00, and five printed bids for expenditures that are $2,500.01 or more.

**Co-Sponsorship Form:** Used to request additional funds from student government for an existing or new program. Amount being requested cannot exceed $500, and is subject to approval by your student government.

**Line Change Form:** Used to move money from one line to another line in the same program. Only 10% of the student organization’s total budget can be moved per academic year.

**Program Change Form:** Used to move money from one program to another program. Funds must remain in the same line and you can move 100% of funds.

**Program Name Change Form:** Used to change the name of the program, while keeping funds the same.

**Memo:** Although not an official form, memos are required when there is a need to explain something within your payment paperwork. All memos must be signed in ink.

**NECESSARY PAYMENT VOUCHER DOCUMENTS**

<table>
<thead>
<tr>
<th>Reimbursement</th>
<th>Invoice/CUNYFirst</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Payment Request Voucher</td>
<td>1. Invoice</td>
</tr>
<tr>
<td>2. Purchase Requisition, if single purchase over $250.01</td>
<td>2. CUNY Substitute W9 Form</td>
</tr>
<tr>
<td>3. Receipt or Invoice</td>
<td>3. CUNY Direct Deposit Form, if necessary</td>
</tr>
<tr>
<td>4. Credit/Debit Card Statement (must include: full name, last four digits of card and charge)</td>
<td>4. Contract, if necessary</td>
</tr>
<tr>
<td>5. Copy of Credit/Debit Card (showing only last 4 digits)</td>
<td>5. Bid Form, if over $250.01</td>
</tr>
<tr>
<td>6. Bid Form, if over $250.01</td>
<td>6. Signed memo, if necessary</td>
</tr>
<tr>
<td>7. Signed memo (if necessary)</td>
<td>7. Event Flyer</td>
</tr>
<tr>
<td>8. Event Flyer</td>
<td>8. Receipt/Proof services were rendered</td>
</tr>
<tr>
<td>9. Wire Transfer Form</td>
<td></td>
</tr>
</tbody>
</table>

If you paid in cash, make sure the invoice states that the bill has been paid in full.

*COI refers to Certificate of Insurance. Please confirm with your Advisor regarding if your event requires additional insurance.*
Student organizations are permitted to have a private account for any club-related expense, and to make donations to an external organization. Private account purchases, similarly to club budget purchases, must be processed through CUNYfirst. Private accounts are not restricted to specific programs or lines and can be used for expenses not covered by your club budget. All clubs are offered the opportunity to have a private account, and the funds can be supplemented through donations and fundraising efforts.

Due to the pandemic and distance learning measures implemented for the Spring semester, no club or organization is allowed to do any fundraising or other activity to supplement their private account funds. During this time, organizations will still be allowed to spend their private account budget. However, be mindful that the funds cannot be supplemented this semester.

USING YOUR STUDENT ORGANIZATION PRIVATE ACCOUNT
In order to use your private account, you must complete the same steps necessary for student government-issued budgets (see page 18 for CUNYfirst Budget Spending Proposal Form Step-By-Step Guide).

USING YOUR PRIVATE ACCOUNT FOR DONATIONS
If you would like to donate to an external organization, you will need to contact your Advisor directly to ensure that the organization is a listed vendor in the CUNYfirst system. Once you meet with your Advisor to confirm or add the organization as a CUNYfirst vendor, you must submit the following paperwork to your Advisor.

1. Payment request voucher
2. Organization’s W-9 form
3. Signed letter explaining why donation is being made

Once the paperwork is submitted, a check will be sent directly to the external organization on the club’s behalf.
All expenditures for personnel services (speakers, musicians, DJs, performers, etc.) require a written contract. A contract is a legal document, which, upon its completion, binds the participants to the terms of the agreement. **You must work with your Student Life Advisor when handling contracts.** Log on to MyBaruch and request a contract by submitting the required information. Under no circumstances should you be engaging in a contractual conversation with a vendor. Any contracts executed or signed by a student are against Baruch College policy and will be considered void. There are different contracts depending on the types of service. Below is a brief description of each:

### TYPES OF CONTRACTS

<table>
<thead>
<tr>
<th>Performance Service Agreement</th>
<th>Service Agreement</th>
<th>Honorarium</th>
</tr>
</thead>
<tbody>
<tr>
<td>This type of contract is used for vendors that perform at an event. These vendors may also be managed by an agent. Some examples are: DJs Bands Musicians Dancers Singers Magicians</td>
<td>This type of contract is used for vendors that provide a service. Some examples are: Photographer Food Servers Lighting Engineer Coach Bus Service Salon Services Smoothie Business Owner Full Catering Service</td>
<td>This type of contract is used for panelists or speakers that attend your event. They may offer insight, give a lecture or provide information to your audience on a particular topic. Honorariums should never amount to more than $2,000. Consult with your advisor to discuss fees.</td>
</tr>
</tbody>
</table>

### IMPORTANT CONTRACT NOTES

- Student organizations can request a contract through the Contract Request Form, found on MyBaruch.
- Contracts should be submitted two weeks prior to the submission of your Budget Spending Proposal Form (which is due six to eight weeks prior to your event).
- Contracts should **NEVER** be turned in after the performance or event. In this circumstance, contracts will not be honored.
- Contracts are always signed by the vendor or performer **FIRST** and then by Baruch, never the other way around. For questions about the specifics of contract routing and approvals, please speak with your Advisor.

### PROCESSING A CONTRACT

**Step 1:** Make sure that you have enough money available in the proper program and line of your student organization budget to pay for the contract.

**Step 2:** Request an Invoice and a W-9 from the vendor. You will need these documents when requesting the contract on MyBaruch.

**Step 3:** Fill out a Contract Request form on MyBaruch. Your Advisor will review all of the information, and, if approved, will put together a Baruch College Association contract using information from the vendor and language sanctioned by the Baruch College Association. This process takes time so please plan accordingly.
Step 4: Upon completion of the contract, work with your Advisor to have the contract sent to the vendor for signatures. The vendor always signs first, in the Contractor spot. Upon signature from the vendor, the contract will be routed by your Advisor for approval/signature from the Vice President for Student Affairs/Dean of Students Office.

Step 5: When your contract is back from the Dean of Students Office, your Student Life Advisor will send you the contract via email attachment.

Step 6: Submit the completed contract, and other supporting documents, with your Budget Spending Proposal Form. See page 18 for CUNYfirst Budget Spending Proposal Form step-by-step guide.

SPECIAL CIRCUMSTANCES
Contracts are complicated and many unusual circumstances can arise. The most common ones are listed below. In general, it is important to stay in close contact with your Student Life Advisor throughout the entire contract process until your vendor is paid.

**Contract Costs over $1,000**
Talk to a Student Life Advisor. You will need to get comparative bids before you proceed with this contract. You must submit the bids to the Office of Student Life who will be in consultation with the Dean of Students Office for approval.

**Contractor Has Their Own Contract**
Have them forward your Advisor a copy of their contract. Speak with the Office of Student Life should the contractor insist on using their own contract.

**Contractor Sends Over Additional Documentation (E.G., “Contract Rider”)**
Bring any additional documents that the contractor sends to you to the Office of Student Life for review, even if you receive them after you have an approved contract.

**Contractor is Unavailable to Sign the Contract Until the Date of the Performance**
If the contract has been completed (except for signature) and the vendor has been approved by the Office of Student Life prior to the event, then the contractor/performer may sign the contract on the date of the performance. Follow up with your advisor for instructions on completing the payment.

**Contractor Wants to Be Paid by Check Upon the Completion of Services/Performance**
It is not possible to pay a contractor upon the completion of services being rendered. All contracts will be paid two to five business days after services are rendered and proof is provided via a receipt.
OFF-CAMPUS EVENTS

In order to maintain the safety and health of all Baruch College students, faculty and staff, there will be no off-campus events held during the Spring 2021 semester. Clubs and organizations may not host, advertise or promote any club-related or third-party activity.

ALCOHOL

Alcohol is not permitted at any student organization sponsored event. This includes virtual events hosted on any platform, and includes participants of 21 years and older. Failure to adhere to these established guidelines may result in disciplinary action and/or termination of organization funding, suspension of future programming, etc.

ALUMNI ACCESS, PARTICIPATION, & THE OFFICE OF ALUMNI RELATIONS

The Office of Student Life recognizes the benefit of alumni participation in student organizations and encourages student clubs to inform the Office of Alumni Relations and Volunteer Engagement (ARVE) about alumni related initiatives. Students must follow the outlined policy to ensure the safety, integrity, and proper allocation of resources within student organizations:

- **Two days** prior to an event, students must submit their alumni participation lists to the Office of Alumni Relations and the Office of Student life by following these protocols:
  - Lists of four or more alumni *must* be submitted through an EXCEL format
  - Columns must include: first name, last name, graduation year, and email
  - Submit lists and/or speaker or panelists here: [bit.ly/3awjZPg](https://bit.ly/3awjZPg)

- The Office of Alumni Relations and Volunteer Engagement can support student organizations seeking: alumni speakers, panelists, developing program content, and partnering on an event. For assistance with any of these items, student clubs must:
  1. Contact ARVE **six weeks** prior to your intended event
  2. Complete an alumni request form and review our tip sheet for working with our office, found in “Club Resources” on the [Student Life website](https://studentlife.baruch.cuny.edu) or visit: [bit.ly/2udbWmI](https://bit.ly/2udbWmI)
  3. Meet with an Alumni Relations representative virtually to discuss event goals and logistics

- Only 15% of student activity fees may be allocated to outside guests (alumni are considered outside guests) with exceptions, on a case by case basis, when in partnership with the Office of Alumni Relations and Volunteer Engagement.

- Alumni participation with student organizations is to be in a mentorship or professional development capacity only.

- Club executive boards may submit a proposal regarding the role of alumni mentors and benefits of alumni participation.

- Alumni who graduated from Baruch College can no longer participate in the day-to-day activities of student organizations.

- Alumni may not fundraise on behalf of student organizations.

The Office of Alumni Relations and Volunteer Engagement

Email: [alumni@baruch.cuny.edu](mailto:alumni@baruch.cuny.edu) | Phone: 646-660-6097
RAFFLES AND GIVEAWAYS

The use of Student Activity Fee money for raffle prizes and giveaways is highly discouraged but not prohibited. Student leaders should think strategically about the purpose of the item and how much it costs in relationship to the total event cost. Student activity fee money should benefit as many Baruch students as possible rather than a select few.

- Raffle prizes and giveaways cost should not exceed $299.
- If the raffle prize and/or giveaway has been purchased through Student Activity Fee money, then the recipient of the prize must be a registered Baruch College student.
- All winners must provide a copy of their Baruch ID with their EMPL ID and name visible, in order to receive their prize.
- All raffles and giveaways must receive prior approval from the Office of Student Life. Raffles and giveaways purchased prior to approval will not be reimbursed.
- Members of the student organization that purchased the giveaway cannot win the giveaway.

RAFFLE GUIDELINES

Any money collected via a raffle up to the full value of the item(s) purchased, including those bought with suggested donations, must be returned to the student organization budget prior to any donations being made to a charity. A minimum $1 value must be applied to a raffle ticket even if it is suggested donation.

FUNDRAISING GUIDELINES

Student Organizations can host fundraising events for third-party organizations or charities if donations are submitted directly to the organization. Clubs and organizations may not collect funds via Venmo, Zelle, Cashapp or other virtual fund collection platform with the intention of transferring funds to the third-party or charity organization. During the Spring 2021 semester, clubs and organizations may not host fundraisers to collect funds for club use.

The Office of Student Life must approve all fundraising activities/events (including events that utilize “suggested donations”) up to six weeks in advance.

PURCHASE OF EQUIPMENT, SUPPLIES OR MATERIAL ITEMS

Student Activity Fees cannot be used to purchase equipment, supplies, or materials related to student events without prior discussion and written permission from the Office of Student Life. Items that can be consistently used from year to year for annual events, the feasibility of long term storage, long term practicality of items, and whether the purchase is an effective use of Student Activity Fees are some factors to be considered before approval may be given.

Examples of items that will not be approved include, but are not limited to, the following:

- Clothing of any kind worn for events that include costumes, fashion shows, etc.
- Uniforms
- Alcohol-related promotional items including shot glasses, bottle openers, etc.

Items that are approved for purchase will be inventoried by the Office of Student Life and properly logged and placed in a secure location at the close of each academic semester. The items can be checked out with the Office of Student Life at the start of the semester after the student organization has followed the appropriate registration process.
TICKETING FOR EVENTS

All student organizations are prohibited from charging entry, or requiring a paid ticket for any virtual events. Failure to adhere to these established guidelines may result in disciplinary action and/or termination of organization funding, suspension of future programming, etc.

VIRTUAL PROMOTION

Virtual Postings must be consistent with the principles and values espoused by Baruch College. The content of the postings must avoid demeaning or discriminatory portrayals of individuals or groups, cannot be libelous, violate copyright law, or contain any material that is inconsistent with the community standards of Baruch College.

- All signs, flyers, and posters should bear the following: [1] name of the sponsoring group(s); [2] admission policy; [3] date, time, and location of the event; [4] any special information applicable to the event (e.g., guest speakers), the serving of refreshments, etc. [5] Contact information for organization or person responsible.
- Signage noted in a different language should also be translated into English.
- Any posting not carrying a Baruch affiliation on it will be notified of its needed changes.
- Failure to comply with any of the aforementioned requirements will result in the loss of social media promotion assistance from the Office of Student Life.

FILMS AND RECORDING OF EVENTS

FILM SCREENINGS

The owners of the distribution rights of a film must license film screenings, regardless of whether or not admission is charged. The license for display varies depending upon the film. Films rented from Netflix, Hulu, or other streaming and rental services are for personal and private use only and any public display of the film is a violation of United States Copyright Laws and is punishable by a fine and/or imprisonment. Therefore, if you do not have the license to screen the film then you are not permitted to advertise or screen the film at a campus event, including virtual events. Only officially licensed films should be advertised.

AUDIO OR VIDEO RECORDING OF EVENTS

Federal copyright laws protect individual performers, artists and/or speakers from having their work copied without their express authorization. Audio or video recording of an event is permissible with the verbal or written consent of a performer, speaker or artist. In the event that a performer or speaker does not wish to be tape-recorded, a statement prohibiting the use of audio or video recording and/or the taking of photographs should be included in all publicity for your event and a sign should be prominently posted at all entrances to your event (“Video or Audio Taping is Prohibited”). Any guests attending the event will be asked to refrain from recording. However, this cannot be guaranteed with the use of virtual platforms. In all instances, appropriate permission must be sought through the Baruch College Office of Communication & Marketing if the intention is to use the Baruch College name and/or the College’s logo or brand.

ZOOM RECORDING

Video recording of a Zoom event is permissible with the consent of attendees. If your club or organization intends to record a Zoom event, this information must be included in the flyer and marketing for the event prior to it taking place. This also includes, but is not limited to, live streaming of events from Zoom to other platforms such as Facebook and YouTube.
INSTAGRAM, FACEBOOK AND YOUTUBE RECORDING

In the event that a performer or speaker does not wish to be recorded for an event, they should be informed that there is no guarantee that this can be honored on virtual platforms. Any performer, speaker or attendee should be informed in the flyer and marketing for the event that events will be recorded or stored on a public platform prior to it taking place, as well as upon entry to the event.

GIFTS TO CUNY EMPLOYEES

As public officers, City University of New York (CUNY) employees perform their official duties consistent with the requirements of the New York State Public Officers Law. As such, CUNY employees cannot accept any gift, no matter what the value, from any student, current vendor, and/or a company seeking to do business with CUNY.
APPENDIX A

APPENDIX A: FISCAL GUIDELINES FOR THE EXPENDITURE OF STUDENT ACTIVITY FEES

INTRODUCTION

1. Section 16.2 of the bylaws of the Board of Trustees of The City University states: “Student activity fee funds shall be allocated and expended only for the following purposes:
   a. Extracurricular educational programs,
   b. Cultural and social activities,
   c. Recreational and athletic programs,
   d. Student government,
   e. Publications and other media,
   f. Assistance to registered student organizations,
   g. Community service programs,
   h. Enhancement of the college and university environment,
   i. Transportation, administration and insurance related to the implementation of these activities,
   j. Student services to supplement or add to those provided by the university and,
   k. Stipends to student leaders.

In accord with Section 16.4 of the bylaws, Student activity fees may support activities provided:
   a. that such activity is for the direct benefit of students enrolled at the college,
   b. that participation in the activity and the benefit thereof is available to all students enrolled in the college and,
   c. that the activity does not contravene the laws of the city, state or nation, or the published rules, regulations, and orders of the university or the college.

2. The Bernard M. Baruch College Association, Inc. (“the Association”) is a non-profit corporation, chartered under the laws of the State of New York and the bylaws of the Board of Trustees of The City University of New York. It exists for the purpose of receiving student activity fees and reviewing and approving annual allocations and expenditures of those fees. The duties of the Association include the establishment and oversight of procedures for the receipt, allocation and expenditure of student activity funds, as well as real or personal property, to affect the objectives as set forth above. The ultimate responsibility for the property, affairs, and concerns of the Association rests in the Board of Directors. The operating boards of the Association consist of the Athletic Board, Communications Board, Student Center Board, Undergraduate Student Government, and Graduate Student Assembly.

BUDGET PROCEDURES

1. **Estimate of Funds Available.** The allocating body and each operating board shall receive an estimate of total revenues, including any carry over balances from the prior fiscal year available for use in the forthcoming fiscal year, from the Treasurer of the Association.

2. **Requests for Budget Submissions.** The appropriate allocating body or operating board shall request that each organization or other interested individual submit a program/line budget.
   a. Detailed instructions and budget forms shall be sent by the allocating body or appropriate operating body to each appropriate campus organization and/or interested individual by both campus and U.S. mail to the last known Treasurer of each organization. These instructions shall include a calendar which will provide dates by which the budget must be submitted during the Spring semester, dates for budget hearings, and a list of the accounts or budget category lines, as well as information on appeals procedures and all appropriate deadlines. Copies of these
instructions shall be filed with the Secretary of the Board of Directors of the Association.

b. Student Organization Budget Requests. The following information shall be provided by student organizations requesting funds as appropriate:
   1. Organization name,
   2. Officers’ names,
   3. Size of membership,
   4. Purposes of the organization,
   5. Other sources of funds, if any,
   6. Requested budget allocation by program and line items. The following budget lines are to be used as appropriate in the budget request:
      i. Contractual Services: speakers, performers, DJ’s, rentals, security charges, etc.
      ii. Food and refreshments.
      iii. Supplies: flyers, posters, office supplies, advertising, promotion, etc.
      iv. Equipment: tangible items with a useful life of at least a year.
      v. Miscellaneous: requests in excess of $100 in this category for student organizations require additional specificity (i.e.: transportation $100, postage $250, etc.)

c. Student Government Budget Requests. The executive of each student assembly shall present a budget request to the appropriate Assembly for its approval. The budget request should utilize the following budget lines as appropriate:
   1. Contractual Services: Events,
   2. Equipment,
   3. Food and refreshments,
   4. Personnel,
   5. Supplies and,
   6. Miscellaneous requests in excess of $500 in this category require additional specificity.

d. Student Media Budget Requests. The officers of each student media (newspapers and radio station) shall present a budget request to the Communications Board for its approval. The budget request should utilize the following budget lines as appropriate:
   1. Contractual Services,
   2. Equipment,
   3. Printing,
   4. Telephone,
   5. Personnel,
   6. Advertising and Promotion,
   7. Food,
   8. Supplies and,
   9. Miscellaneous: requests in excess of $100 in this category require specificity [i.e. postage, maintenance contracts, transportation, etc.]

3. Budget Hearings. After initial program budgets are submitted by organizations and interested individuals, the operating board or allocating body shall conduct hearings with each organization or interested individual during the spring semester.

4. Budget Allocations. The allocating body shall make a budget allocation for the forthcoming fiscal year to each organization or individual. The allocating body will notify each organization or individual of said allocation before the close of the spring semester. Operating Boards will forward a budget request to the College Association Budget Committee for its consideration. The Budget Committee shall develop a budget for the approval of the Board of Directors of the Bernard M. Baruch College Association, at its final meeting of the spring semester. The College Association may approve the budget or reject all or parts of it which it deems inappropriate, improper, or inequitable. If the budget is rejected,
it is returned to the Budget Committee for further deliberation and re-submittal to the College Association. If the budget is not approved within 30 days, those portions of the budget voted upon and approved by the College Association board will be allocated. The remainder shall be held until the College Association and the Budget Committee agree. Once approved, these budgets may be expended according to the procedures and calendars of the allocating body and these guidelines.

5. **Revised Program Budgets.** Each organization or individual shall be permitted to resubmit a revised program budget on a line-by-line basis, based upon their final total allocation, to the appropriate allocating body for modification, by the end of the 5th week of the Fall semester. Any resubmitted line budgets shall be reviewed by the appropriate allocating body. The allocating body must approve any resubmitted budget no later than the end of the 8th week of the spring semester.

6. **Budget Modifications.** Modifications of final budgets during the course of the fiscal year may be made by the appropriate allocating body subject to these guidelines and such rules and procedures that the allocating body may establish. No modifications shall be approved after April 15th.

7. **College President’s Review Authority.** In accordance with Section 16.11 [b] of the bylaws of the City University, the President of the college shall have the authority to suspend and send back for further review any student activity fee, including student government fee, allocation or expenditure, which in his or her opinion is not within the expenditure categories defined in section 16.2 of the bylaws. The College Association shall, within ten days of receiving a proposed allocation or expenditure for further review, study it and make a recommendation to the President with respect to it. The College President shall thereafter consider the recommendation, shall consult with the General Counsel and Vice Chancellor for legal affairs, and thereafter communicate his/her final decision to the allocating body as to whether the allocation or expenditure is disapproved.

**BUDGET GUIDELINES**

1. **Officer Responsibility for Expenditures.** Officers must be familiar with the applicable fiscal guidelines, rules and regulations of the Bernard M. Baruch College Association, Inc. All Officers with signature authority agree to be held responsible for all budgets, purchase requisitions, contracts, payment requests, etc. An organization which makes expenditures not within its approved budget may jeopardize future funding as well as subject its officers to discipline procedures.

2. **Budgets.** Budget requests must contain a detailed explanation as to how the monies will be expended. The budget should detail the proposed expenditures by program and budget line categories.

3. **Budget Modifications and Transfers.** An organization or individual may petition the appropriate allocating body for a budget modification if such a change is necessary. Transfers may be made between lines or within existing programs up to 10% of the total allocated budget with the approval of a designated representative of the allocating body. A denial of such a transfer may be appealed to the allocating body. Transfers in excess of 10% must be presented to the allocating body for its approval.

4. **New Programs Not Specified in Budgets.** The allocating body must approve new programs that have not been specified in the resubmitted budget at least two weeks prior to the scheduled event.

5. **Spring Semester Expenditures Not to Exceed 50% of Budget.** No more than 50% of the total amount of funds allocated in an annual budget may be spent or committed during the spring semester. In the event that fee and/or income collections spring short of those estimated, budget revisions must be made prior to actual expenditures for the spring semester.

6. **Payment for Services.** No Baruch College faculty member or administrator shall be paid for services rendered to an organization. Student officers shall not be paid for services rendered to their own organization except as herein provided under paragraph 7.

7. **Stipends.** Stipends may be paid for services performed by currently enrolled students in accordance with
a line item budget approved by the allocating body. Examples of such student services include such functions as an elected officer of the College Association or student government, editor of a student newspaper, or president of a student organization. Payment shall not be measured by hours devoted to the performance of the position, but shall be issued only in accordance with the policies of the Board of Trustees of the City University. Stipend payments to student leaders are limited to a maximum of two (2) years; except that a student who receives two years of stipend payments as an undergraduate, shall be permitted a third year of stipend payments as a graduate student. Student leaders shall be limited to maximum stipend of $5,134 per year effective July 1, 2017, or no more than $2,475 per semester effective July 1, 2017. The exact amount to be determined by the allocating body, however no more than 12% of a total student assembly budget, nor more than 35% of the prior fiscal year's advertising revenue of a publication, may be utilized for stipends. A student may not receive more than one stipend for the same time period, or be an employee of, or receive any other compensation from, a student activity fee allocating body. In addition, the Chairperson of the University Student Senate shall be limited to a maximum of $11,152 per year effective July 1, 2017 and no more than $5,576 per semester effective July 1, 2017. Furthermore, Vice-chairpersons of the University Student Senate shall be limited to a maximum of $6,502 per year effective July 1, 2017 and no more than $3,251 per semester effective July 1, 2017. All rules and regulations regarding stipends, including but not limited to maximum limits shall be in accord with guidelines adopted by the Board of Trustees of the City University.

8. Employment of Personnel. Personnel may be employed only if specific funds for this purpose have been approved through the normal budget allocation procedures. Whenever appropriate, consideration should be given to the employment of students. The rate of pay for the hours employed will be approved by the allocating body and must be consistent with College pay scales. Additionally, the budget line must include all appropriate fringe benefits and/or payroll taxes. All paid positions must be advertised in appropriate media.

9. Open Programs; On and Off-Campus Events. All programs and events receiving student activity fees must be open to the entire Baruch community and must be appropriately publicized and held on campus. An event may be held off-campus utilizing student activity fees only at the discretion of the Dean of Students, or designees, which must be requested at least six (6) weeks prior to the event. Such permission will be granted based upon the merits of each request. Details for Baruch College may be reviewed on page 30 of this handbook. Consideration will be given to:
   a. The availability of suitable campus facilities,
   b. The proximity of the off-campus location to the availability of suitable campus facilities,
   c. The proximity of the off-campus location to the campus,
   d. The day and time of the event,
   e. The ease of access that students will have to attend the event,
   f. The expected number of attendees,
   g. The adequacy of security guard coverage at the location,
   h. The amount of liability insurance coverage necessary.

*Please remember that off-campus events are not permitted during the spring 2021 semester.

10. Equipment Purchases. Any equipment purchased by any organization, individual, or allocating body, regardless of the source of funds, is the property of the College Association, and may be utilized for whatever purposes deemed appropriate by the Board of Directors. The purchase of equipment must be made in accordance with these guidelines. All equipment must be appropriately secured when not being utilized. Review pg. 31 of this handbook.

11. Travel, Transportation and Meal Expenses. Transportation, travel, and meal expenses in connection with authorized programs, conferences, conventions, meetings, or in the performance of official business, are reimbursable if properly budgeted for, or if sufficient miscellaneous funds are available. Prior approval must be sought in accordance with the nature and amount of the expenditure as provided within these guidelines. Transportation, travel and meal requests must include a statement of the type,
destination and purpose of the expense incurred. Overnight accommodations must avoid any excessive and unreasonable expense in accordance with NYS travel guidelines. Whenever possible, the least expensive mode of public transportation should be utilized. Use of personal vehicles is permitted with prior approval, and will be reimbursed at a rate in accordance with NYS Travel Reimbursement guidelines, only when suitable public transportation is unavailable. Meals (breakfast and dinner, but not lunch) may be reimbursed to a maximum of $8 for breakfast, and a maximum of $34 for dinner per person. Receipts for meals are required. All travel entailing overnight accommodations is subject to the prior approval of the Dean of Students office in conjunction with the Office of Student Life. See page 30 for details.

EXPENDITURE PROCEDURES
1. **Budgeted Expenditures.** Expenditures for items not specified in an approved budget may not be made.

2. **Purchases of $250 or less.** Purchases of $250 and less do not require prior approval, purchase requisitions, or bids. Every effort should be made to obtain the necessary goods and/or services at the most reasonable price. Such purchases should not be made to circumvent competition. The Baruch College Association, Inc. shall not issue more than $2,000 to any vendor during one calendar year.

3. **Purchase Requisitions for Purchases greater than $250, but less than $1,000.** Purchases greater than $250, but less than $1,000, require that three (3) vendors must be solicited. These three bids, on identical specifications, may be obtained verbally and summarized in a written signed statement attached to a purchase requisition. The purchase requisition must be submitted for approval to a staff member in the Office of Student Life, as representatives for the Baruch College Association, Inc., prior to the actual expenditure. If the purchase is from a vendor other than the lowest bidder, a memorandum of explanation for the reasons for the choice of that vendor must accompany the payment request form signed by two officers of the organization. Upon approval, a purchase order will be issued and is to be given to the successful bidder authorizing the purchase.

4. **Purchase Requisitions for Purchases greater than $1,000, but less than $2,500.** Purchases greater than $1,000, but less than $2,500, follows the same procedure as in paragraph 3, but must be reviewed by the Director of Student Life as a representative of the Baruch College Association, Inc.

5. **Purchases greater than $2,500 but less than $20,000.** Purchases of $2,500 and greater require informal written sealed responses which must be received by a specified date and time. Bid requests must be sent to at least five (5) vendors. A response indicating no wish to bid is acceptable. Approval by both the Director of Student Life and the Office of Student Affairs, are required as representatives of the Baruch College Association, Inc.

6. **Purchases greater than $20,000.** Purchases greater than $20,000 require a formal contract entered into after advertising and a formal competitive bidding process. The Vice President must review the bidding process and contracts for Student Development through his designee, the Associate Dean of Students, on behalf of the Baruch College Association, Inc.

7. **Payment Request Vouchers.** Payment request vouchers are distributed by the Student Services Accounting Unit to each allocating body and operating board. Student organizations may obtain payment request forms from the appropriate allocating body. A separate payment request form must be submitted for each payee. Purchase requisitions, original receipts, invoices, any necessary contracts, letters of prior approval, and a copy of the publicity for an event, must be attached to the payment request form upon submission to the appropriate operating board or allocating body.

8. **Signatures.** Organization Registration. Purchase requisitions and payment request forms must be signed by at least two (2) officers of the organization, who must be currently registered students at Baruch College, and listed on the organization’s registration and signature authorization cards filed with the Office of Student Life, the Student Services Accounting Unit, and the appropriate operating board or
allocating body. No payments of any kind will be made unless the organization is registered with the appropriate Student Life Office, and signature authorization cards are on file in the Accounting Unit.

9. **Check Disbursements by Mail.** The Student Services Accounting Unit will mail checks approximately five (5) working days after submission of payment request forms by the appropriate allocating body to the Accounting Unit. If special circumstances require it, a request may be made by the appropriate officer to the Accounting Unit to receive a check personally.

10. **Food and Refreshments; Licensed Food Vendors.** Purchase requisitions for the purchase of food must be used as outlined above. Checks for the purchase of food and refreshments payable to a food vendor may be obtained prior to receipt of the purchase upon a timely submission of a payment request voucher, together with a purchase requisition and pre-bill itemizing the type, quantity, and price of the refreshments that have been ordered. Only licensed food vendors should be used. The Office of Student Life, only upon a showing of exceptional cause, will approve exceptions to the use of licensed food vendors in advance.

11. **Reimbursements.** Payment request forms should be made payable to a vendor. A student may advance up to $250 of his/her own monies for a permissible expenditure and seek reimbursement upon the submission of original receipts or invoices.

12. **Sales Tax Exemption.** The Bernard M. Baruch College Association, Inc. is exempt from NYS and NYC sales and use taxes. Sales tax will not be paid to any vendor or as a reimbursement on any purchase within NYS. Sales Tax Exemption certificates are available from the Student Services Accounting Unit.

13. **Expenditures for Personnel Services; Contracts.** Expenditures for personnel services [speakers, musicians, performers, etc.] require a written contract. Contract forms for personnel services are available from the Office of Student Life. Contracts must be signed by the contractor prior to submission to the Office of Student Life for review and approval. Contracts shall not be deemed effective unless and until approved by the Office of Student Life. If the contract is not submitted for review prior to the event, and funds are not available in the appropriate budget lines, the contract shall not be approved and any reserved space for the event may be cancelled. Following the appropriate approval, the contract together with a Payment Request form should be submitted to the appropriate allocating body for its approval. The allocating body will forward the payment request and contract to the accounting unit for subsequent payment. This contract process requires a minimum of three (3) weeks from original submission to payment.

14. **Personnel Services Exceeding $1,000.** Personnel services in excess of $1,000 must receive the additional prior approval by the Dean of Students, through their designee, three (3) weeks prior to the use of said services. Requests for such approval must include documentation evidencing that the cost of the personnel services being provided is competitive with recent charges by the performer of those services.

15. **Non-Political Expenditures.** No funds, material, property or services funded by student activity fees may be used for any partisan or nonpartisan political activity or to further the election or defeat of any candidate for public or political party office.

16. **Honors and Awards.** No more than 10% of the total budget may be spent by an organization on honors and awards without advance approval of the allocating body.

17. **Revenues.** Section 16.7 of the City University bylaws provides that all revenues generated by student activities funded through student activity fees shall be subject to the control of the allocating body. The application of such revenues to the account of the income generating student organization shall require specific authorization of the allocating body or operating board.

18. **Deposits of Revenues; Organization Private Accounts**
a. All revenues from events and organization dues, in accordance with the Fundraising Guidelines outlined below, must be deposited with the Student Services Accounting Unit in the organization’s “Private Account [A].” Monies on deposit in organization private accounts may be expended through the same payment request system utilized for student activity fees. The expenditure of these monies requires the two (2) authorized signatures of the organization and is to be expended on programs and projects within the academic year. An organization’s unspent private account funds shall revert to the appropriate allocating body or fund unallocated surplus upon the end of the fiscal year. Upon an organization’s dissolution, any funds on deposit in an organization’s private account [A] shall revert to the unallocated surplus of the appropriate allocating body or fund at the close of the fiscal year.

b. Funds received from other outside sources [i.e., agencies, grants, etc.] earmarked for specific purposes [i.e., leadership development, national organization affiliate revenue, etc.] shall be deposited into the organization’s “Private Account [B]”. The expenditure of these monies requires the two authorized signatures of the organization and a signature of a representative of the Office of Student Affairs. Funds left on deposit in a private account [B], upon the dissolution of an organization, shall revert to a scholarship fund within the College Association.

19. **Student Organization Bank Savings/Checking Accounts.** No organization or individual shall maintain a bank savings or checking account in the organization’s name.

**FUNDRAISING GUIDELINES AND PROCEDURES**

1. **Written Form; Fund Raising Approvals.** Any organization that wishes to sponsor a fundraising program or project must submit a Charitable Activity Request form, which must include the method of fund raising and the distribution of said funds, to the Office of Student Life and the appropriate allocating body. All fund raising programs or projects must be approved by the allocating body and the Office of Student Life prior to commencing the project, copies of said approval will be forwarded to the Student Services Accounting Unit.

2. **Fund Raising Costs.** All costs of the program or project must be on deposit in the appropriate budget line or private account in the Student Services Accounting Unit prior to commencing the program or project.

3. **Auditing and Accounting Controls.** All fund raising projects must include appropriate auditing and accounting controls that will permit full disclosure of expenses, income and distribution of net proceeds. All monies, as collected, must be deposited to the credit of the sponsoring organization in a private account in the Student Services Accounting Unit. All deposits must be made no later than the next business day after the funds are collected.

4. **When student activity fee monies are utilized for program expenses.** Income equal to the student activity fee expenses must be deposited to the credit of the appropriate allocating body. Net proceeds [income after expenses are subtracted] may be donated to specifically recognized non-profit charitable organizations or may be retained by the group sponsoring the project as specified in the original fund raising proposal. The distribution of net proceeds, the proper crediting to appropriate allocating bodies and private accounts, must be completed within ten (10) business days of the close of the project or program.

5. **Expenditure of Private Account Monies.** Monies on deposit in student organization private accounts may be expended through the same payment request procedures utilized for student activity fees. Utilization of these funds is limited to programs and projects scheduled during the academic year in accordance with the Fiscal Guidelines of the College Association.

6. **Methods of Fundraising.**
   a. Dues and Donations. Student organization members may voluntarily pay minimal dues to the organization. A student cannot be denied membership to, or any benefits of, the group on the
basis of an unwillingness or inability to pay dues. The appropriate Student Activities Office(s) must review a statement of the proposed voluntary dues structure. The organization’s treasurer must utilize a receipt book for dues collection and all dues, together with a copy of the collection record, must be deposited to the credit of the organization in a private account in the Student Services Accounting Unit.

b. Raffles. The distribution and sale of raffle books and the deposit of revenues must be arranged with the Student Services Accounting Unit. Raffles must be conducted with a specific purpose intended. The purpose of the fund raising must be stated together with the cost, the prizes, and the name of the sponsoring organization on the face of the ticket. Tickets must be consecutively numbered. All prizes, or sufficient funds to purchase stated prizes, must be on deposit in the Student Services Accounting Unit prior to commencing raffle sales. Raffle tickets will be consigned to each seller by the Accounting Unit in blocks of up to 50 tickets. Sale of raffles in classrooms is prohibited. Raffle sales for the purpose of scholarship funds must receive prior approval from the Office of Student Affairs. The sponsoring organization and the individual raffle seller must account for all raffles and cash receipts.

c. Events Utilizing Ticket Sales/Distribution
   1. A program which will include ticket sales and/or ticket distribution requires all of the costs of the program to be on deposit in appropriate budget lines in the Student Services Accounting Unit prior to the commencement of ticket sales. The sponsoring organization must request tickets to be ordered at least three weeks prior to the event. All tickets must include the following information on the face of the ticket and will be ordered by the Student Services Accounting Unit on behalf of the organization with the cost being charged to the sponsoring organization:
      • Name of Sponsoring Organization;
      • Name of the Event;
      • Date, Time, and Place of the Event;
      • Ticket Price;
      • Seat Number [if applicable];
      • A consecutive audit number that must appear on both halves of the ticket to permit tear stubs and auditing.
   2. Box Office Sales/Distribution. Tickets may be sold and/or distributed through the student center ticket distribution system at the lobby reception desk. Tickets will be sold until two days prior to the event or a sellout takes place.
   3. Individual Sales/Distribution. The sponsoring organization may designate, in writing to the Student Services Accounting Unit, the names and ID numbers of students who will be authorized to sell and/or distribute tickets. Each seller will be consigned a block of 50 tickets to sell. All cash and unsold tickets must be returned to the Accounting Unit two (2) days prior to the event.
   4. Door Sales. Advance ticket sales are always more desirable, however, unsold tickets may be sold “at the door” the day of the event only by an officer of the sponsoring organization, provided that secured ticket locations, away from the main access to the function, can be set up. The Accounting Unit will issue the tickets to the officer and it is the officer’s financial responsibility to account for all unsold tickets and cash receipts to the Accounting Unit no later than the close of the next business day after the event.
   5. At the conclusion of all ticket sales, cash collected plus remaining unsold tickets, if any, shall be returned to the student services accounting unit along with a reconciliation of tickets to be accounted for, tickets sold, and cash on hand, no later than the close of the next business day after the event.

d. Sales. Sales of food or other items on consignment will be permitted only in designated areas of the college. Receipts must be provided upon customer request. A policy statement on refunds or adjustments, where appropriate, must be posted. All monies collected from said sales must be deposited by the end of the business day in the Student Services Accounting Unit.
APPENDIX B: UNDERGRADUATE STUDENT GOVERNMENT

USG CONTACTS
The following individuals in USG will be your primary point-of-contact for several student organization-related aspects. Become familiar with them and reach out to them when you need assistance.

TREASURY
Please direct all budgetary usage and paperwork/form completion or submissions to the USG Treasurer. Submission of any documents MUST be made by the club’s treasurer or president. Please check your paperwork is in order before submitting. Feel free to contact the USG Treasurer, Nancy Sea for any questions or concerns at nancy.sea@usgbaruch.com.

THE APPEALS COMMITTEE
The Appeals Committee receives and reviews proposals regarding additional funding for student organizations that helps cover the costs of their events. If you’re interested in requesting an appeal or learning more about appeals, contact the Chair of Appeals, Irine Thomas, at irine.thomas@usgbaruch.com.

THE FINANCE COMMITTEE
The Finance Committee is responsible for allocation student organizations’ budgets each year. Be sure to contact the Chair of Finance, Lesli Cuamani, at lesli.cuamani@usgbaruch.com.

CLUBS AND ORGANIZATIONS COMMITTEE
The Clubs and Organizations Committee is responsible for three important tasks: assessing all co-sponsorship requests from undergraduate organizations, holding individual student organization check-ins, and executing the annual Bernie’s Awards Ceremony. For any questions about the above, contact the Chair of Clubs and Organizations, Alison Lee, at alison.lee@usgbaruch.com.

*** Please feel free to contact the above-mentioned persons directly via e-mail. ***

*** USG will be conducting information sessions and workshops to focus and teach the technical portions listed in this appendix. Please be on the lookout via your club e-mails and our social media platforms. ***
STEP-BY-STEP APPEALS GUIDE

STEP 1
Student Organization wants to appeal for more money

STEP 2
Appeal Form is filled out

STEP 3
Form and any additional details get sent to Appeals Committee for review

STEP 4
Meeting scheduled and conducted between Committee and Student Organization
More detail requested by Committee

STEP 5
Appeal presented before USG Senate
Committee elects not to present proposal

STEP 6
Approved as stands
Modified, but approved
Rejected

STEP 7
Sent to Board of Directors for approval

STEP 8
APPROVED
DENIED

Text version of the Budget Appeals Guide
APPEALS COMMITTEE

The Appeals Committee allocates additional funds requested by student clubs and organizations. We serve the student organizations of Baruch by processing and reviewing their requests. Student organizations may appeal for numerous reasons that include, but are not limited to: needing additional food, supplies and decorations for the event, an expensive, but necessary vendor, or a new event. Essentially, anything that causes costs to exceed the budget that was allocated in the initial budget can be requested through an appeal. The Committee is impartial and focuses on the year-long picture because of the complex nature of allocating additional money.

Once the appeal is submitted, it’s reviewed by the Committee. The Committee follows strict rules and guidelines and may request additional information or documents before moving forward with the application, this may include invoices from vendors and prices for supplies and equipment. The Committee will then review the allocation and the proposed appeal amount is brought to the USG Senate meeting for approval. If approved, it is then brought before the Board of Directors (BOD) for final approval. Finally, if it is approved by the BOD, the money is transferred into the student organization’s budget.

Student organization leaders will be emailed important deadlines on a monthly basis, or when necessary. The Appeals Committee must adhere to a strict set of deadlines in order to be on schedule for the Senate meetings, USG Treasurer, and the BOD.

If you have any questions or concerns, feel free to contact the Appeals Committee.

Sincerely,

Irine Thomas, Chair of Appeals

Undergraduate Student Government

irine.thomas@usgbaruch.com
CO-SPONSORSHIPS: CLUBS AND ORGANIZATIONS COMMITTEE

What is a USG Co-Sponsorship?
Student organization leaders can request additional funding of up to $500 for their events in the form of a co-sponsorship from USG.

Who do I contact for a USG Co-Sponsorship?
The Chair of Clubs and Organizations is responsible for all USG Co-sponsorships requests. You can contact Alison Lee at alison.lee@usgbaruch.com.

What do I need to provide?
You need to submit a co-sponsorship form which can be found at www.usg-bearcat.com > Clubs > Important Forms > USG Forms > Co-sponsorships. You can submit it to the Chair of Clubs and Organizations in person OR scan the form along with other necessary paperwork and send it via email.

What paperwork is necessary?
a. Payment Request Voucher (up to $250)
b. Purchase Requisition Voucher, Payment Request Voucher, Bid Form ($250-$500)
c. Detailed Breakdown of Expenditures on how the money will be used
d. If event was held previously, breakdown of past expenditures
e. Flyer for the event

When is the deadline to submit all paperwork?
Forms should be submitted TWO WEEKS prior to the event in order to give the Chair of Clubs and Organizations time to evaluate your co-sponsorship request. If submitted late, co-sponsorship requests will NOT be accepted unless a valid reason is given.

How are USG Co-Sponsorships evaluated?
The Chair of Clubs and Organizations along with their committee will review your requested amount, taking your current budget, breakdown of expenditures, and other various resources into consideration.

How do I know if a USG Co-Sponsorship has been approved?
The Chair of Clubs and Organizations will send an official email informing you that the request has been approved along with the official USG logo to be placed onto the marketing materials.

Other Questions?
Please feel free to contact the Chair of Clubs and Organizations if you have any other questions.
FINANCE COMMITTEE

The Finance Committee plays an essential role in student organization operations at Baruch College by serving as the primary point of contact for the funding of active, on campus undergraduate organizations. The ultimate goal of the committee is to support Baruch’s student organizations with the financial backing they need to nurture their development, while catering to the needs of students. The committee allocates funds from Student Activity Fees, thereby allowing organizations to hold events that successfully achieve their respective missions, acquire a larger member base, and have a positive impact on the quality of college life for their fellow Bearcats.

The budget allocation process is a complex, multi-step process that requires coordination and communication between the Finance Committee and the members of the student organizations it helps. Members of the Committee will meet with some or all e-board members of each student organization to discuss funding for the upcoming academic school year. In addition, the Committee will attend organization events held to ensure the proper spending of allocated funds and experience the impact its decisions have on student organization and student life at Baruch College. By also taking into consideration factors including, but not limited to, an organization’s goals, on campus history, outreach, and efficiency, the Finance Committee effectively and appropriately allocates funding on a case-by-case basis.

Below are a series of steps of how to work with the Finance Committee to obtain a budget:

1. Log on to USG-Bearcat.com.
2. Select the “More” tab.
3. Select “Clubs” and choose from the dropdown “Club Forms”.
4. Select “Budget Proposal Form”.
5. Complete the form and email it to lesli.cuamani@usgbaruch.com.
6. Upon receipt, a member of the Finance Committee will schedule an interview with the student organization’s e-board. The following items must be brought to the interview:
   a. Budget proposal
   b. Current budget allocation
   c. Supporting documents
7. Utilizing the interview, and other factors, the Finance Committee will determine the most appropriate allocation of funds for the student organization.
8. The Senate will vote on the Committee’s proposed budget during a scheduled USG meeting after the budget submission deadline.
9. Once the Senate has voted, the budget must be voted upon by the Board of Directors (BOD) for final approval.
APPENDIX C: GRADUATE STUDENT ASSEMBLY (GSA)

Our mission is to represent Baruch College graduate students across all programs. In order to do so, it will be beneficial for you to become familiar with the GSA Board. Reach out to us if you have any questions or concerns about Graduate Student Life, interacting with the Schools (Zicklin, Marxe, Weissman), Baruch College, or CUNY as a whole. We are here to serve!

CLUBS AND ORGANIZATIONS
The Clubs and Organizations Committee coordinates between the GSA and graduate clubs to include appeals for more funding, co-sponsorships, and general inquiries. Please contact Donnley Castello Edwards (GSA President) at Donnley.CastelloEdwards@baruchmail.cuny.edu with your questions or comments.

TREASURY
The Treasury Committee is available for questions related to budgets, payments, and vouchers. Please contact Shani Batat (GSA Treasurer) at shani.batat@baruchmail.cuny.edu and Kishan Patel (GSA Assistant Treasurer) at Kishan.Patel2@baruchmail.cuny.edu.

SOCIALS AND EVENTS
GSA and Student Life is committed to provide the graduates students with a well-rounded college experience that promotes personal and professional growth and development while enriching their academic studies. Please contact Dexter Roberts (Events Planner) at dexter.roberts@baruchmail.cuny.edu.

EXTERNAL RELATIONS
The External Relations Committee is available to assist with questions related to the wider CUNY network, the Baruch College Administration, and entities outside of CUNY. Please contact Donnley Castello Edwards (GSA President) at Donnley.CastelloEdwards@baruchmail.cuny.edu.

GSA CONFERENCE ROOM RESERVATIONS
Given the current outcome as a direct result of COVID 19, all classes will be remote and the GSA conference room is not available for reservations for the Spring 2021 semester.

GET INVOLVED
If you are interested in being involved with the GSA, please attend the GSA Bi-Weekly Meetings (every other Tuesday night, 9:00-10:00 P.M. and every third Saturday from 3:00-5:00 P.M. (via Zoom Conference) to express your interest. Please feel free to contact Donnley Castello Edwards (GSA President) at Donnley.CastelloEdwards@baruchmail.cuny.edu with your questions about joining GSA.

For our social media accounts, please find us on:
Facebook (www.Facebook.com/GSABaruch/), Instagram (www.instagram.com/baruchcollegegsa/)
Twitter (twitter.com/Baruch_GSA), LinkedIn (www.linkedin.com/groups/13560089).
## APPENDIX D: IMPORTANT DATES AND DEADLINES

<table>
<thead>
<tr>
<th>FALL 2020</th>
<th>SPRING 2021</th>
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</thead>
<tbody>
<tr>
<td><strong>Organization Registration in MyBaruch</strong></td>
<td><strong>Organization Registration in MyBaruch</strong></td>
</tr>
<tr>
<td>Opens – April 27, 2020</td>
<td>Opens – December 1, 2020</td>
</tr>
<tr>
<td>Closes – September 11, 2020</td>
<td>Closes – February 12, 2021</td>
</tr>
<tr>
<td><strong>New Student Organization Applications for Fall:</strong></td>
<td><strong>New Student Organization Applications for Spring:</strong></td>
</tr>
<tr>
<td>Opens – August 26, 2020</td>
<td>Opens – January 29, 2021</td>
</tr>
<tr>
<td>Closes – September 20, 2020</td>
<td>Closes – February 28, 2021</td>
</tr>
<tr>
<td><strong>Convocation: Tuesday, August 25, 2020: 9:30 A.M.</strong></td>
<td><strong>BOLT Workshops:</strong></td>
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<td></td>
<td>January 21, 2021: 6:00–8:00 P.M.</td>
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<td></td>
<td>January 26, 2021: 12:30–2:30 P.M.</td>
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<td></td>
<td>February 2, 2021: 12:30–2:30 P.M.</td>
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<tr>
<td></td>
<td>February 9, 2021: 6:00–8:00 P.M.</td>
</tr>
<tr>
<td><strong>BOLT Workshops:</strong></td>
<td><strong>Spring Club Fair:</strong></td>
</tr>
<tr>
<td>August 20, 2020: 6:00–8:00 P.M.</td>
<td>Undergraduate Student Government (USG), Departments, Media Clubs, and Cultural, Identity, &amp; Multi-Faith Clubs.</td>
</tr>
<tr>
<td>August 24, 2020: 6:00–8:00 P.M.</td>
<td>February 4, 2021</td>
</tr>
<tr>
<td>August 26, 2020: 6:00–8:00 P.M.</td>
<td>12:30–2:30 P.M.</td>
</tr>
<tr>
<td>September 1, 2020: 6:00–8:00 P.M.</td>
<td>6:00-8:00pm</td>
</tr>
<tr>
<td>September 3, 2020: 6:00–8:00 P.M.</td>
<td>Undergraduate Student Government (USG), Pre-Professional, Honor, Greek Letter Orgs, Academic Clubs, and Special Interest Clubs.</td>
</tr>
<tr>
<td>September 8, 2020: 12:30–2:30 P.M.</td>
<td>February 11, 2021</td>
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<td></td>
<td>12:30–2:30 P.M.</td>
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<tr>
<td><strong>Fall Club Fair:</strong></td>
<td>6:00-8:00pm</td>
</tr>
<tr>
<td>Club Fair: Pre-Professional, Academic, Honor</td>
<td>Undergraduate Student Government (USG), Pre-Professional, Honor, Greek Letter Orgs, Academic Clubs, and Special Interest Clubs.</td>
</tr>
<tr>
<td>August 27, 2020: 12:30–2:30 P.M.</td>
<td>February 11, 2021</td>
</tr>
<tr>
<td>Club Fair: Depts., Student Gov’t/Media, Special Interest</td>
<td>12:30–2:30 P.M.</td>
</tr>
<tr>
<td>September 1, 2020: 12:30–2:30 P.M.</td>
<td>6:00-8:00pm</td>
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<tr>
<td>Club Fair: Cultural, Identity, Multi-Faith</td>
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<tr>
<td>September 3, 2020: 12:30–2:30 P.M.</td>
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<tr>
<td><strong>Last Date of Programming for Fall 2020:</strong></td>
<td><strong>Last Date of Programming for Spring 2021:</strong></td>
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<tr>
<td>Wednesday, December 9, 2020</td>
<td>Monday, May 17, 2021</td>
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*Dates and times are subject to change. Contact the Office of Student Life for the most current dates.*