

# FUNDING TRAINING

ASUI Student Organization Funding Board



# How to Receive Funding:

## □ **STEP 1:**

Please review the bylaws to make sure your student organization is eligible to receive funding. You can do this at: <http://uidaho.orgsync.com/finances>

## □ **STEP 2:**

Attend a MANDATORY Council Meeting. This meeting is designed to help clubs understand how the funding process works and includes information on filling out the funding application, advice on presenting your request to the board, and necessary requirements to receive funding.

## □ **STEP 3:**

Complete a Funding Request Form at <https://orgsync.com/31064/forms/show/37330> and W-9 form. All Funding Request Forms must be turned in by **12pm on the Funding Application Deadline**.

## □ **STEP 4:**

Wait for confirmation/auto approval. The Funding Board Chair will contact you within **two business** from the Funding Board Meeting to inform you of the Board's decision.

## □ **STEP 5:**

Attend the Funding Board Reimbursement Hearing if you've received notification from the Funding Board Committee to attend.

## □ **STEP 6:**

Upon completion of the Event/Travel, fill out a Travel Expense Funding Form or Non-Travel Expense Funding Form on orgsync.com. Contact Meladi Lanier, Interim Program Coordinator, at [meladi@uidaho.edu](mailto:meladi@uidaho.edu) to make an appointment to turn in these forms and your original receipts.

## □ **STEP 7:**

Wait for your check to be processed. It takes a minimum of **three** weeks. Checks are available for pick-up from the ASUI Administrative Assistant in Commons 302. *Note: organizations must communicate with Meladi within thirty (30) days of notification of check being available as to what their plan of action is.*

# Funding Board Bylaws

- Articles VII-XII pertain to you as a student organization and qualifications for funding.
- **Bylaws in their entirety can be found here:**  
<http://www.uidaho.edu/studentaffairs/departments-of-student-involvement/student-orgs/reimbursement>

# Quick Bylaw Overview

- All funds allocated by the ASUI Funding Board shall be at the discretion of the Board.
- The Board may fund a maximum of \$2000 to recognized organizations in any given fiscal year. Funding requests to exceed the \$2000 limit may be heard at the last fee allocation hearing of the budget cycle and will only be heard if funds are available.
- **All funding will be on a reimbursement basis.**
- All events/programs/services that receive funding must be open to all UI students.

The board shall not fund for the following activities:

- Purchase of food or beverages or other perishable items unless purchased through the University.
- Cash awards, prizes or gifts.
- Labor Costs, unless purchased through the University
- A bingo event or raffle.
- Per Diem while traveling.
- Long-distance phone calls.
- Charitable contributions.
- State and Federal Income taxes.
- Organizational or departmental graduation parties, award ceremonies, and banquets.
- Transportation and or lodging for speakers, unless part of the contractual agreement.

# Other Labor Services

## Food:

<http://www.uidaho.edu/dining/catering/menus>

## Labor:

Sound Production and Lighting

<http://www.sub.uidaho.edu/spl>

University Support Services

<http://www.uidaho.edu/uss>

Parking Services

Law Enforce/Public Safety

# Quick Bylaw Overview (Cont.)

## Section B – Travel

- If student travel is involved in a funding request, the Board will apply the following criteria, as well as any additional considerations:
    - Is the travel going to benefit the majority of the student body?
    - Who will be traveling? Just members of the organization, or were all students offered the opportunity to go on the trip?
    - How were the travel participants chosen?
    - Is the travel experience able to be duplicated in the surrounding community, or is it an “once-in-a-lifetime” opportunity?
    - Is the travel request for travel to a structured event (i.e. conference, competition, or workshop)?
    - Can the travel participants demonstrate knowledge gained from the travel experience?
  - Have the travel participants made an effort to share their experience with the campus community, or how will they?
  - What is the percentage of students who are traveling, who will be returning to UI for at least one semester?
  - **Advisors, graduate students, and non-students, cannot receive funds for travel.**
- In funding travel expenses, official University figures for mileage and amounts will be used; if figures requested by the student organization are different, the figures resulting in the lowest cost to the Board will be used. The Board may allocate a maximum of:
- **Transportation:**
    - Mileage will be reimbursed for use of a personal car at the current university rate \$0.55
    - The actual cost of rental, insurance, and gas for a rented vehicle.
    - 50% of the cost of airline tickets.

Get directions

My places



moscow, id

san francisco, ca

Add Destination - Show options

GET DIRECTIONS

### Suggested routes

**US-97 S** 879 mi, 16 hours 19 mins

US-95 S and I-80 W 910 mi, 16 hours 23 mins

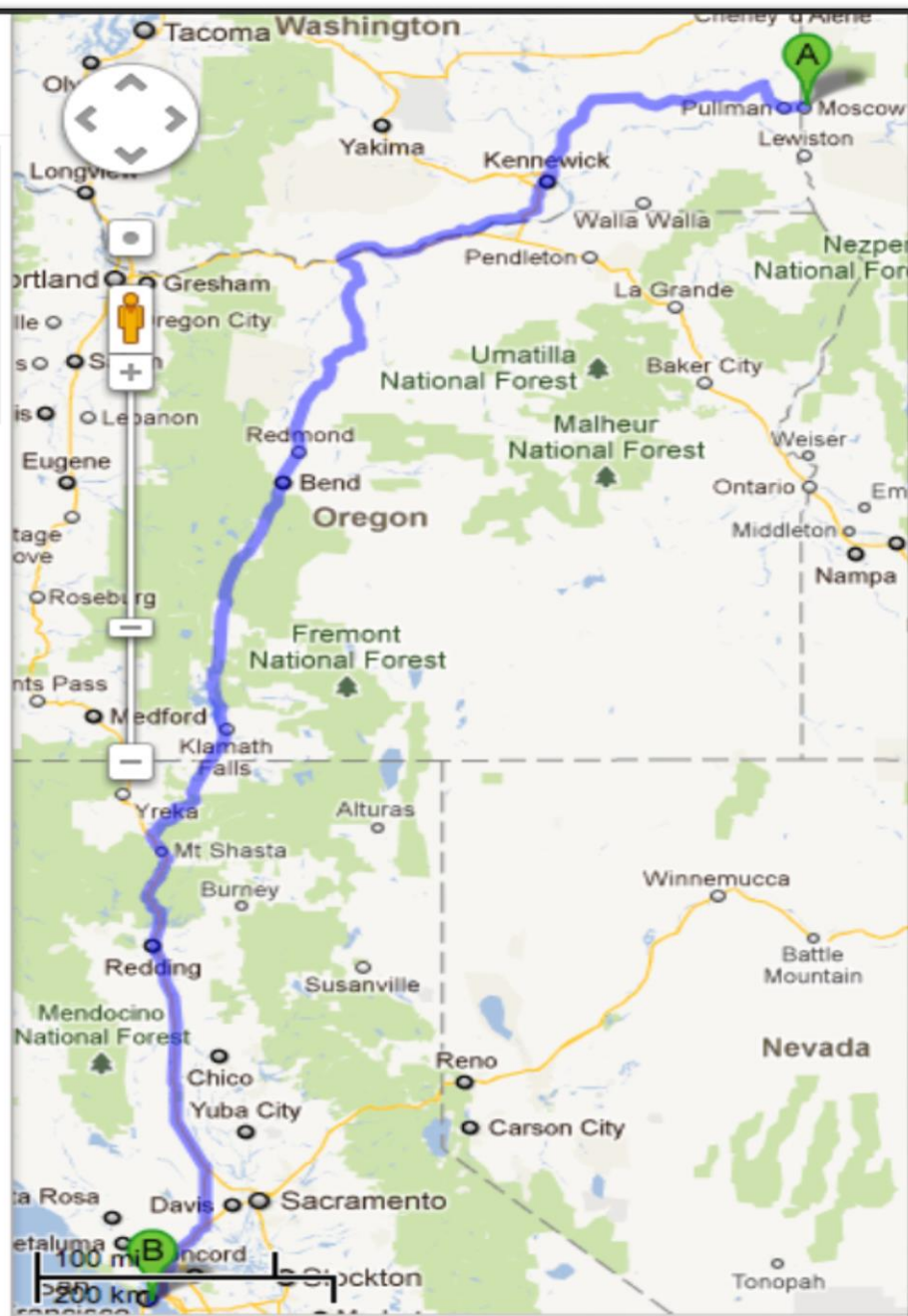
I-5 S 994 mi, 16 hours 56 mins

### Driving directions to San Francisco, CA

This route has tolls.

#### Moscow, ID

1. Head west on **E 3rd St** toward **S Main St** 0.4 mi
2. Slight right onto **W Pullman Rd**  
Entering Washington 1.5 mi
3. Continue onto **WA-270 W/Pullman**



# Receipts & Reimbursement

- Original, **itemized receipts**
- Hotel requires a portfolio – ask for this from the front desk
- Airplane – need a receipt AND an itinerary
- Receipt has to meet three criteria:
  - ▣ Who paid it
  - ▣ How it was paid
  - ▣ Proof that it was paid



# ASUI Student Organization Funding Request Form (STEP 2)

## Organization Detail Summary

Note: This form has several sections that may require scanning and uploading documents. All UI Student Computing Labs are equipped with scan machines for students' use.

### Name of Organization \*

Full Name

### Organization Acronym

### Applicant

Person who attended Funding Training meeting

First Name

Middle Initial

Last Name

Email Address

Phone Number

Address

City

State

Zip

Validation Valid input may include: name@myschool.edu

### Officer 1 Name \*

### Officer 1 Email Address \*

Validation Valid input may include: name@myschool.edu

### Officer 1 Phone Number \*

Validation Valid input may include: XXX-XXX-XXXX

### Officer 2 Name \*

### Officer 2 Email Address \*

Validation Valid input may include: name@myschool.edu

**Officer 2 Phone Number \***

**Validation** Valid input may include: XXX-XXX-XXXX

**Advisor Name \***

**Advisor Email Address \***

**Validation** Valid input may include: name@myachool.edu

**Advisor Phone Number \***

**Validation** Valid input may include: XXX-XXX-XXXX

**Advisor Contact Information \***

Please include campus address with zip code & UI Department

You can find this information in the campus directory.

<http://directory...>

**Membership Profile \***

Please indicate the number of Undergraduate\* members

**Membership Profile Continued \***

Please indicate the number of Graduate\* members

Previous

Save & Finish Later

Next

## ASUI Student Organization Funding Request Form (STEP 2)

### Funding Information

#### Date(s) of Request \*

Day your organization attends a Funding Hearing

#### Amount requesting from ASUI. This amount matches your spreadsheet. \*

#### Date(s) of Event

(if applicable)

#### Selection Dropdown \*

If selected "Check" please upload a W-9 form\* & upload a current bank statement\* for your organization account

Department Transfer option only available to groups with sponsoring LI Departments

#### \*W-9 Form Upload

Must be uploaded if you are requesting a check. Note: forms can be downloaded online at <http://uidaho.org>... If you need access to a scanner you can utilize the scanner in ASUI - ask Meladi the admin and she will help you out.

File Upload (8MB max)

The maximum size of a file upload is 20MB.

 Upload

#### \*Organization Bank Statement Upload

Must be uploaded if you are requesting a check. Note: the organization's bank statement must be recent  
File Upload (8MB max)

The maximum size of a file upload is 20MB.

 Upload

Previous

Save & Finish Later

Next



**State of Idaho**  
 700 West State Street, P.O. Box 83720  
 Boise, ID 83720-0011  
 Combined Substitute W9/Direct Deposit Authorization Form

Agency use only:  
 Agency number: \_\_\_\_\_  
 Contact name: \_\_\_\_\_  
 Contact Phone Number: \_\_\_\_\_

**Part I - Substitute W-9 Tax Identification:**

Name: YOUR AMAZING STUDENT ORGANIZATION

Complete if you are a SOLE PROPRIETOR or SINGLE-OWNER LLC } Required: Personal name of owner of the business \_\_\_\_\_  
 Optional: Business name if different from above: \_\_\_\_\_

Enter your Tax Identification Number in the appropriate box.  
 For individuals, this is your social security number (SSN). For other entities, it is your employer identification number (EIN).

Social Security Number  
 \_\_\_\_\_

OR

Employer Identification Number  
123.45.6789

Check appropriate box:  Individual/Sole proprietor  Corporation  Partnership  Other (explain) Student organization

**Exemption:** If exempt from Form 1099 reporting, explain exemption here:

**Signature:** I am a U. S. person (including a U. S. resident alien).

Person completing this form: JANE VANDAL Title: \_\_\_\_\_

Signature: Jane Vandal Date: \_\_\_\_\_ If address for payments is different, please list payment remit address below:

Tax correspondence address: ASU General University of Idaho  
875 Krimeter Dr MS 2535

City: Moscow State: ID ZIP: 83844-2535

Phone: ( ) \_\_\_\_\_

**Part II - Direct Deposit Authorization (Optional).** To receive payments electronically, complete this portion of the form and attach a voided check (not a deposit slip) or bank verification of your checking or savings account number.

Request type: New  Change  Cancel

Account holder Name/Title (Title required if company account): AMAZING STUDENT ORG

Routing Number: \* Account Number: \*

Account Type (Please check the appropriate box):  C - Checking Account  S - Savings Account

I hereby authorize and request the Idaho State Controllors Office (SCO) and the Idaho State Treasurers Office (STO) to initiate credit entries for vendor payments to the account indicated above. I agree to abide by the National Automated Clearing House (NACHA) rules with regard to these entries. Pursuant to the NACHA rules, the SCO and STO may initiate a reversing entry to recall a duplicate or erroneous entry that they previously initiated. I understand that, if a reversal action is required, the SCO will notify the office identified above in Part I of the error and the reason for reversal.

This authority will continue until such time as SCO and STO have had a reasonable opportunity to act upon written notice to terminate or change the direct deposit service initiated herein.

Signature of Authorized signer on account: JANE VANDAL Print Name Here: JANE VANDAL Sign Here: Jane Vandal

NOTE: Invalid account information will be rejected by the vendor's financial institution and generate a notice of change which is routed through the NACHA network to the STO. A notice of change will result in this request being voided and any future payments being made by Idaho State Warrant.

**Part III - Remittance Advice on the Web.** To access payment information on the Internet, complete this portion of the form and provide a phone number in Part I. Additional information can be found on our website: <http://www.sco.state.id.us/>. Initial login instructions will be mailed to the payment address provided in Part I.

I want to view my remittance advices on the Web. Check one.	No	Continue getting paper remittance advices mailed through the US Postal Service.
	Yes-One	Get payment information for this location only by using the State Controllors Office Web Remittance Advice Application.
	Yes-All	Get payment information for all of your locations by using the State Controllors Office Web Remittance Advice Application.

## ASUI Student Organization Funding Request Form (STEP 2)

### Request Summary

Describe in detail the Event or Project for which you requesting funding with the following questions:

Provide a summary of your funding request. The information here should explain your spread sheet. \*

Who, What, Where, When, Why

Does your organization plan on raising money for this activity yourselves? How? \*

How will the students of the University of Idaho benefit from your request of their funds and/or how will this further the development of your organization? \*

Have you ever received funds from the Funding Board this academic year?

- Yes  
 No

If yes, how much and for what?

Previous

Save & Finish Later

Next

# ASUI Student Organization Funding Request Form (STEP 2)

## Financial Summary

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Please read the Funding Board Bylaws, Article VII before filling in the chart below with all expenses of proposed event or project. This list should include expenses that can be covered by ASUI funds (fundraising activities, travel, registration fees, honorariums, organizational operations, etc.) as well as other expenses accrued (food, awards/prizes, labor costs, etc.). Please also fill in the revenue section below to show how you are going to fund the cost of your event/project.

PLEASE DOWNLOAD SPREADSHEET SEPERATELY FROM THE WEBSITE: <http://uidaho.org...>

Note: The form is called "Funding Budget Spreadsheet"

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### Funding Budget Spreadsheet Upload \*

File Upload (8MB max)

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The maximum size of a file upload is 20MB.

 Upload

Previous

Save & Finish Later

Next

# Scenario

A delegation of three undergraduate students, one graduate student and an advisor are going to the semiannual AASG conference on February 20-22. The cost of registration per student is \$125. The conference is held in San Francisco, CA so the delegation would need to fly. Airfare per person out of the Pullman airport is \$725 round trip. The delegation plans on eating three times per day, with an average meal cost of \$12.95 per person. The delegation will be staying at the Micro Hotel, two rooms, at \$89 per night. The taxi cost from the airport to the hotel round trip is \$53. The group currently has \$8324 in their bank account. Their department gave them \$365.89 and raised more money. They had a bake sale, which brought in \$326, and a date auction, which brought in \$417.

## EXPENSES:

Registration: \$125/person (no registration fee needed for advisor)

Airfare: \$725/person

Meals: \$12.95/person/meal three times a day

Accommodations: \$89/night/room

Taxi Cost: \$53

## INCOME:

Department: \$365.89

Bake Sale: \$326

Date Auction: \$417



## Event/Project

EXPENSES			REVENUE	
ITEM	Eligible	Actual	ITEM	AMOUNT
Personal Car:			Departmental Funding	
[ ] Miles x \$0.55	\$0.00		1) Gov Dept	\$365.89
Airfare:			2)	
\$2,175.00 x 50%	\$1,087.50	\$3,625.00	Special Grants/Donations	
In-State Hotel:			1)	
[ ] Nights x [ ] rooms x \$ 60	\$0.00		2)	
Out-of-State Hotel:			Fundraising:	
[ ] 2 nights x [ ] 1 rooms x \$ 80	\$ 160.00	\$178.00	1) Spaghetti Feed	\$326.00
Other: (food, supplied, etc)			2) Date Auction	\$417.00
1) Registration	\$500.00	\$500.00	Other:	
2) Taxi	\$53.00	\$53.00	1)	
3) Extra Person in Room (x2 nights)	\$10.00		2)	
4) Meals		\$194.25	3)	
5)			4)	
6)			5)	
7)			6)	
8)			ASUI Requested Funds	
<b>TOTAL ELIGIBLE FOR FUNDING</b>			<i>(From page 2)</i>	\$1,770.50
<b>TOTAL ACTUAL EXPENSES</b>			<b>TOTAL REVENUE</b>	
	\$ 1810.50	\$4,550.25	\$2,879.39	

X

By signing, you confirm the content in this document is correct to the best of your knowledge.

*\*Note: Please fill in shaded cells only, the descriptions, and sign above. All calculations will be done for you.*

**EXISTING ACCOUNT FUNDS (Balance in Bank Account) \$8,324.00**

# Sample Forms:

- **Sample forms are available:**
  - <http://www.uidaho.edu/studentaffairs/department-of-student-involvement/student-orgs/reimbursement/sample-forms>
- Key things to look for and include in your application.

# Forms Due Date



**REMEMBER:**

Forms are due by the deadline at 12:00pm

Late submissions **will not** be accepted.

# If Granted Funds:

- Upon completion of the Event/Travel, fill out a Travel Expense Funding Form or Non-Travel Expense Funding Form on orgsync.com. Contact **Meladi Lanier**, Interim Program Coordinator, at **meladi@uidaho.edu** to make an appointment to turn in these forms and your original receipts
- You have **30 days** from the date you receive notification of funding or your event (which ever comes first) to turn in receipts in order to receive the funding.

# Funding Hearing Expectations

- If you're asked to attend the Funding Hearing:
  - Be on time
    - Avoid gaps when signing up
  - Be enthusiastic!
  - Represent your student organization!
  - Send Knowledgeable Representatives!

Composition of board: Chair, Vice Chair, 3 senators, 4 students

# Funding Application Deadlines

2014-2015 Academic Year

- Friday, Sept. 19
- Friday, Oct. 17
- Friday, Nov. 14
- Friday, Jan. 16
- Friday, Feb. 13
- Friday, Mar. 20
- Friday, Apr. 17

# Questions?



- Board chair: Robby Jenkins, [rjenkins@uidaho.edu](mailto:rjenkins@uidaho.edu)
- Vice Chair: Emma Bride, [ebride@uidaho.edu](mailto:ebride@uidaho.edu)
- Advisor: Meladi Lanier, [meladi@uidaho.edu](mailto:meladi@uidaho.edu)