

# 2020-2021 GSA Officer Training



GRADUATE STUDENT ASSOCIATION

# Welcome!

## ➤ Your 2020 – 2021 GSA Executive Board:

- President: J Coley ([gsa-president@buffalo.edu](mailto:gsa-president@buffalo.edu))
- Vice President: Connor Walters ([gsa-vicepresident@buffalo.edu](mailto:gsa-vicepresident@buffalo.edu))
- Treasurer: Joshua Joseph ([gsa-treasurer@buffalo.edu](mailto:gsa-treasurer@buffalo.edu))



# GSA Staff

## ➤ Student Staff

- Editorial Staff: Samantha Schichtel-Greenwood, Courtney Doxbeck and Luke Heister ([gsa-editorial@buffalo.edu](mailto:gsa-editorial@buffalo.edu))
- Programming: Courtney Doxbeck ([gsa-programming@buffalo.edu](mailto:gsa-programming@buffalo.edu))
- MDRF: Jennifer Schechter and Braden Brown ([gsa-mdrf@buffalo.edu](mailto:gsa-mdrf@buffalo.edu))

## ➤ Directors of Operations

- Gena Zimmerman ([gmz@buffalo.edu](mailto:gmz@buffalo.edu))
- Stephanie George ([slfrank@buffalo.edu](mailto:slfrank@buffalo.edu))

# GSA Office working remotely

- The GSA office is going to continue working remotely through the Fall semester.
  - Staff is available via email or Zoom

# Welcome New Club Officers!

Please, ask questions throughout!

- Office of Student Engagement
- EDI- Sexual Harassment Training
- GSA Budgetary Guidelines
- Managing Your Club's Budget
- New Ticket Office Q&A
- Other Important Information

# Office of Student Engagement

- Thomas Vane (tmvane@buffalo.edu)
  - Student Government Liaison
  - University Recognition Deadline: October 15<sup>th</sup>
  - UBLinked and Room Reservations
  - Alcohol Permits

# Office of Student Engagement

- \* Seven student governments:
  - \* Student Association Inc. (SA)
  - \* **Graduate Student Association Inc. (GSA)**
  - \* Graduate Management Association Inc. (GMA)
  - \* Student Bar Association Inc. (SBA)
  - \* Dental Student Association Inc. (DSA)
  - \* Medical School Student Association Inc. (MDSA)
  - \* School of Pharmacy Inc.

# EDI- Sexual Harassment Training

- Jessica Coram, Office of Equity, Diversity and Inclusion
- Aaron Maracle, Wellness Education Services

# Budgetary Guideline Highlights:

## *Crucial Points*

- Funds **must** always be requisitioned (requested and approved) **before** they are spent
- You must contact the GSA **before** the deadline(s) with any problems
- Deadlines for each semester's paperwork can be found in the ***Budgetary Guidelines and Regulations***
- ***All paperwork is due within two weeks of the event/purchase.***

# Budgetary Guideline Highlights:

## *Crucial Points*

- No GSA money, or funds generated using GSA money can be held in accounts outside of GSA.
- **All** money collected must utilize the Ticket Office
  - More information later

# Budgetary Guideline Highlights:

## *Crucial Points*

- Requisitions for 2020-2021 must be submitted on or before June 1st and the money spent by July 15th
  - Minutes approving all expenses must also be provided by that deadline
- Clubs may not build up or roll over GSA funds to next year's budget
  - except for independently fundraised money

# Budgetary Guideline Highlights:

## *Guidelines For All Clubs*

- Meetings must be advertised and open to all club members
- Minutes:
  - Must list everybody present
  - Must show the vote (unanimous or detailed)
  - Expenditures cannot be approved by club officers only

# Budgetary Guideline Highlights:

## *Guidelines For All Clubs*

### ➤ Common Expenditures

- Invited Speakers
- Films, videos, or other media rental for public events
- Office supplies
- Printing and publication
  - Up to 20% of budget for publishing scholarly work
  - Club newsletter
- Social events

# In-person events prohibited

- Out of an abundance of caution all in-person GSA events are prohibited until further notice.
  - There are legal liability concerns with GSA organized and/or sponsored events.
  - Clubs can still provide conference and research support, or make purchases of goods or supplies for the benefit of all students in their club.

# Budgetary Guideline Highlights:

## *Guidelines For All Clubs*

- Under normal circumstances...
- All events **must** be held in a public place
  - On-campus space reservations can be made via UBLinked
- Any on-campus event where alcohol will be served require prior approval from the Alcohol Review Board
  - Complete application at least two weeks in advance
  - <https://buffalo.campuslabs.com/engage/submitter/form/start/71526>
- All events must be advertised
  - Include a copy of the advertisement with the final paperwork

# Budgetary Guideline Highlights:

## *Guidelines For All Clubs*

- Board of Directors Meeting Attendance
  - Board meeting attendance can only be counted when someone has signed in prior to the start of the meeting and remains present through roll call.
  - If club representative(s) miss **two** consecutive Board meetings then the club budget will be frozen until the representative(s) attend a subsequent Board meeting
  - Club officers will receive an email reminder after Board member(s) miss one meeting
  
- Please note that all elected Board seats must be filled at each meeting in order for your club's attendance to be counted in full in order to maintain quorum at Board meetings.
  - i.e., If your club is eligible for 3 Board seats and your club elects 3 Board members, then all 3 seats must be filled at each meeting by voting members (Board members, Alternates, and/or Club Officers). If only 2 voting members are present, your club will be considered absent.

# Budgetary Guideline Highlights:

## *Guidelines For **Departmental** Clubs*

- Sponsoring Individual Club Members
  - No more than \$200 to any individual member per year
  - Students with fee waivers are not eligible for funding
  - Conferences, Conventions, and Workshops
    - up to \$200 for presenters
    - up to \$100 for attendees
    - same documentation procedures as GSA conference funding
  - Student Research
    - up to \$200 per year
  - See Guidelines for exclusions and limitations

# Budgetary Guideline Highlights:

## *Guidelines For **Departmental** Clubs*

### ➤ Capital Equipment

- Items costing \$500 or more with a useful life of longer than 1 year are capital equipment
  - Purchases must be pre-approved by the GSA Finance Committee
  - Items must be available to all graduate students in the department
  - GSA owns the equipment and the club is the depository
  - Items location and condition must be accounted for annually as part of the Capital Equipment Survey

# Budgetary Guideline Highlights: *Guidelines For **Departmental** Clubs*

## ➤ Minor Equipment

- Items costing less than \$500 with a useful life of longer than 1 year are minor equipment
  - GSA owns the equipment and the club is the depository
  - Items location and condition must be accounted for periodically
  - Requests may be denied by the GSA Treasurer if there is not a justifiable use or appropriate storage and maintenance plan in place, or if similar items have already been purchased.

# Budgetary Guideline Highlights:

## Guidelines For *Special Interest* and *International* Clubs

- All activities must be advertised to the Graduate Student Body
  - Events must be advertised in English
  - If ads are multilingual, English must be included

# Budgetary Guideline Highlights:

## *Other Funding Opportunities*

- Special Activity – up to \$1,200 once per semester
  - Activities that benefit a large number of graduate students, not just a single department or club
- Symposia – up to \$1,400 once per year
  - Formal meetings that give graduate students an opportunity to present their work
- Scholarly Publication – up to \$1,500 per publication
  - Journals or other academic publications edited and run by grad students
- Community Outreach – earn up to \$250 per year
  - Clubs must perform a minimum of 40 hours of community service to an organization outside of UB

# Budgetary Guideline Highlights:

## *Other Funding Opportunities*

### ➤ Interdepartmental Activity

- Activities organized by and for 2 or more departmental clubs
- GSA may match the amount contributed by the club contributing the least funding (m), multiplied by the number of participating departmental clubs (n)
  - $n \times m$
- Up to \$500 for 2 clubs; additional \$50 for each additional departmental club up to \$750 (total for 7 or more departmental clubs)
  - i.e., 3 clubs = \$550 max, 4 clubs = \$600 max, etc.

# Budgetary Guideline Highlights:

## *Individual Funding Opportunities*

- Conference Funding
  - Up to \$550 for PhD students over their graduate career
  - Up to \$350 for Masters students over their graduate career
  - Up to \$200 per conference if attending and not presenting
- Mark Diamond Research Fund
  - Up to \$1,500 for Masters thesis
  - Up to \$2,000 for MFA final project
  - Up to \$3,000 for PhD dissertation
  - Lifetime maximum of \$4,500

# Budgetary Guideline Highlights:

## *Exclusions and limitations*

- No honoraria for UB faculty/staff
- No secretarial expenses
- No political and religious activities
  - Does not apply to activities designed to provide information or scholarly debate

# Budgetary Guideline Highlights:

## *Exclusions and Limitations*

### ➤ Gifts and Contributions

- Maximum of \$100 per year may be spent on gifts/awards;
- No donations or charitable contributions can be made with GSA funds

# Budgetary Guideline Highlights:

## *Exclusions and Limitations*

- Individual reimbursement for expenses incidental to holding a club activity
  - i.e., Gas money for picking up party supplies, phone charges for planning an event
- Gratuities are limited to 20% maximum
  - Any amount above will not be paid or reimbursed
- \$30 per capita maximum for UB student and faculty meals
- No club funds may be used to pay for the purchase or reimbursement of the cost of tickets for events organized by the GSA.

# Managing Your Club's Budget

## Step 1: Find out about your account

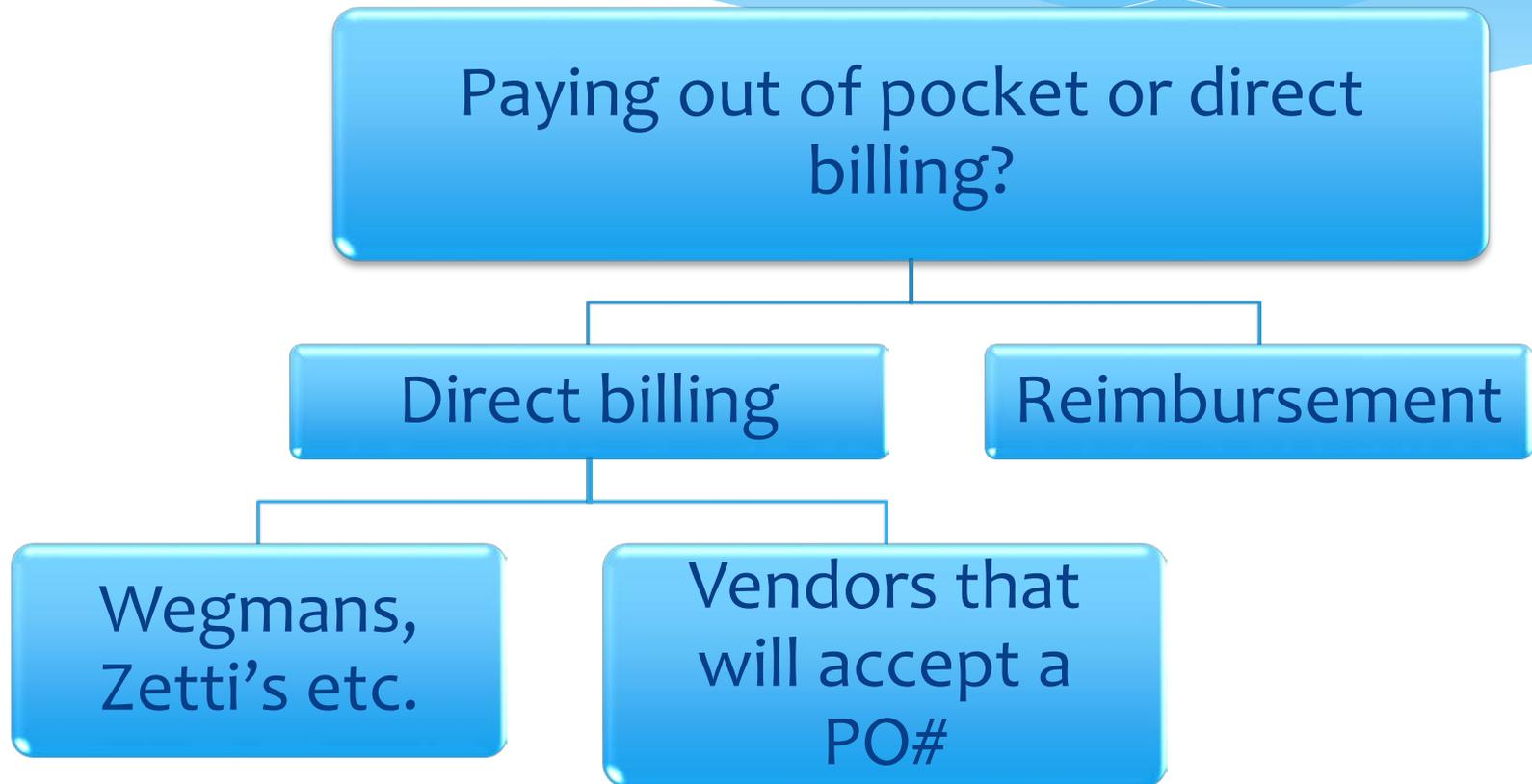
- Know your account balance
  - Email the Directors of Operations
    - [gsa-feedback@buffalo.edu](mailto:gsa-feedback@buffalo.edu)
- Once we are back in the office...
  - Call 645-2960
  - Stop into the North Campus office Monday – Friday
    - 310 Student Union
  - South Campus Satellite office on Tuesdays
    - 302 Abbott Hall (Health Sciences Library)

# Managing Your Club's Budget

## Step 2: Fill out an online Requisition Request Form

- Include vendor name and address (the person or company you are paying)
- Must be requested by a club officer (President or Treasurer)
- Details about what you are requesting
- When and where the event will take place
- Whether or not alcohol will be served should be indicated in the description

# Managing Your Club's Budget



# Managing Your Club's Budget

- GSA can pay some vendors **directly**
  - Wegman's cards can be signed out at either GSA office (once we are back in the office)
  - Franco's, Zetti's, Santora's or Besta Pizza
  - Eaton Office Supply or Staples
    - we place the order and it gets delivered to the GSA office
  - University Bookstore
  - The UPS Store in the Commons
  - Three Pillars Catering or any Campus Dining and Shops organization
- Any vendor that is willing to accept a Purchase Order (PO) and invoice for goods or services
- Be clear to the vendor that the bill must list the club name, and must be mailed to GSA directly, not to the department
  - 310 Student Union, Buffalo, NY 14260

# Managing Your Club's Budget

## Step 3: Wait for Requisition Approval

- Club Treasurers and Presidents will receive the email notification from GSA

# Paperwork required for reimbursement

- **Original, itemized receipt(s), invoice or contract**
  - No photocopies, scans, pictures, faxes or generic, non-vendor specific receipts are acceptable
    - Receipts received electronically from vendors must be forwarded directly to the Directors of Operations
  - The credit card slip that you sign is **not** an itemized receipt. You must submit the itemized cash register receipt **and** the credit card slip.
  - It is your responsibility to request an itemized receipt if one is not provided to you by the vendor.
  
- **Proof of payment**
  - Copy of the credit card or bank statement showing your name as the account holder and listing the posted payment transaction
  - A copy of the front and back of the cancelled check
  - Cash payments must be indicated on the receipt

# Paperwork required for reimbursement

- Club minutes showing the vote to approve the expense(s)
  - Minutes must list amount approved and name of vendor
  - Email votes are not accepted unless there are special circumstances, and only with prior approval from the GSA
  - Please note that all approvals of expenses must be voted on at an open club meeting. **Club officers alone cannot approve expenses!**
- Advertisement for the event
  - i.e. flyer or listserv email
- Receiving Report
  - Verifies that good(s) or service(s) were received in full and authorizes the processing of the payment
- All paperwork should be submitted within 2 weeks of the expenditure

# Managing Your Club's Budget

Step 4: Is there any additional paperwork necessary?

- Tax Forms (needed for new vendors)
- General Services Contract
- Speaker Service Agreement
- Co-sponsorship Agreement (giving money)
- Non Charitable Contribution Form (getting money)

\*GSA will let you know if any of these will be required

# Managing Your Club's Budget

## Out-of-pocket purchase

- GSA is (temporarily) no longer sales tax exempt. We will be reimbursing for sales tax payments up until our NYS sales tax exemption status is approved.
- You will not be reimbursed for any bottle deposits
- Make your purchase and **save all of your receipts**

**\*Please** ask questions **before** you make a purchase if you are unsure about anything

# Managing Your Club's Budget

- Ticket Office / How to make deposits
- Greg Brock ([gebrock@buffalo.edu](mailto:gebrock@buffalo.edu))
  - Ticket Office Manager
- Any time you collect money for **anything at all**, you **must** use the Ticket Office
- Contact 221 Student Union (645-8856) at least seven days before you plan to sell tickets/goods or collect any money
- It is **always** better to ask first rather than make a mistake and be penalized.

# Club Website Policy

- All club websites **must** be hosted on the University's server with GSA as an Administrator of the site
- Any club whose website is found in violation of this policy will have its budget frozen.
- Please contact the GSA if you need assistance managing or creating a club website

# New Student Orientation

- Each Departmental GSA club must hold a new student orientation for all of their members
- This meeting should cover GSA services such as:
  - Programming and Events
  - Conference Funding
  - MDRF
  - Free Editorial Services

# Other Important Info

- All events must have **one** accounting agent (usually GSA or your Department). The accounting agent keeps track of all the funding and expenses for the event. Therefore, all co-sponsorship money must be collected by the accounting agent and all bills must be paid by the accounting agent. You cannot split event expenses between various offices/organizations (i.e. have some bills paid by one office/organization and some bills paid by others).
- No clubs are allowed to contract with outside organizations directly. All contracts must be signed by a GSA E-board member, not the club officers.
- Please note that Club Officers are responsible for forwarding GSA emails to their department/club listservs, as we have limited access to the master graduate student listserv.
- If you are interested in serving on a GSA committee (Finance Committee, Election Committee, Services Committee, Ethics Officer, etc.) please contact the GSA office for more information.

# More info

- All clubs must complete the University Recognition process by updating their UBLinked page. This must be completed by **Thursday, October 15<sup>th</sup>** or your club's funds will be frozen by Student Engagement.
- All updated activation paperwork (Officer election, Board of Directors (formerly Senate) election, New Student Orientation sign-in and Membership list) are due by **Wednesday, September 30<sup>th</sup>** or your club's funds will be frozen!

# Questions?



GRADUATE STUDENT ASSOCIATION