



University Park Allocation Committee

UNIVERSITY PARK ALLOCATION COMMITTEE REQUESTOR HANDBOOK

Revised April 25, 2014

University Park Allocation Committee – Your Student Activity Fee At Work

Established 1996 – The Pennsylvania State University

208 HUB-Robeson Center – University Park, PA 16802 – (814) 863-8951

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1. GENERAL INFORMATION

1.1. MISSION STATEMENT

The mission of the University Park Allocation Committee (UPAC) is to objectively and effectively allocate a portion of the Student Activity Fee (SAF) income towards events, travel experiences, equipment, and other items requested by University Park affiliated organizations or individuals that will ultimately enhance student life, add value to the out-of-class experience, and/or improve the educational climate at the University Park campus.

1.2. CONTACT INFORMATION

UPAC can be contacted via the following methods:

- Telephone: 814-863-8951
- Email: upac@psu.edu
- Mail Address: 208 HUB-Robeson Center, University Park, PA, 16802
- Web Address: www.upac.psu.edu

1.3. MEETINGS

Meetings of the full committee and sub-committees of the University Park Allocation Committee shall be conducted according to *The Modern Rules of Order*.

UPAC will conduct weekly meetings normally held each Tuesday evening during the fall and spring semesters. All committee members are expected to be at all meetings in their entirety. Additional meetings may be scheduled, as circumstances warrant, by members of the Leadership Team.

1.3.1. GENERAL ALLOCATION REVIEW

This is the most common type of review that UPAC schedules. Each allocation team may meet as a sub-committee with a sub-committee chair leading the meeting and an advisor providing guidance as needed.

Agendas are normally set for each allocation team and distributed to the committee members and scheduled requestors by the Thursday prior to the meeting in question. At least one (1) representative from the requesting organization is responsible for attending all scheduled allocation review meetings.

All decisions regarding general allocations requests are made during the sub-committee reviews, after a presentation by the requestor.

1.3.2. STANDING ALLOCATION REVIEW

Standing allocation reviews are scheduled during any part of the weekly meeting by UPAC on an as needed basis normally during the spring semester. Exceptions are at the Chair's discretion. The full committee with the Chair leading the meeting and at least one (1) advisor providing guidance are required to perform a standing allocation review. All members of UPAC are expected to attend standing allocation reviews.

Agendas are set for standing allocation reviews and are distributed to the required attendees and committee members at least one (1) week prior to the meeting. At least one (1) representative from the requesting organization is responsible for attending all scheduled allocation review meetings to provide support of the information submitted by the organization.

Standing allocation reviews will begin with the Chair, committee members, advisors, requestor representative(s) and members of the public gallery taking their seats. The Chair will convene the review and introduce the requestor(s). A presentation from the requestor(s) will be provided followed by a period of committee/requestor question and answer. The committee will then discuss the standing allocation request. Finally, the requestors and gallery will be asked to leave, allowing for a closed recommendation and voting session.

The Chair has the discretion to adapt the meeting process and schedule to best suit the committee's and requestor's needs.

1.3.3. POLICY REVIEW

Any student paying the Student Activity Fee at University Park may research and generate policy recommendations for the UPAC Requestor Handbook.

The Leadership Team will review all policy proposals, correct factual errors in the background and suggest additional changes. Any changes that the author declines will be written up as an addendum to the policy on a separate sheet by a Leadership Team member. The Leadership Team will assign a contact person for each policy change submission. If the policy is found to violate SAF board policy, the author will be notified in writing. Suggested policy changes will be reviewed at the first available policy meeting. The author will be notified no less than twelve (12) academic days in advance of the meeting.

In order to change policy, UPAC must conduct a full committee meeting. In rare cases where it is not possible to convene the entire committee, it will be the responsibility of the Leadership Team to establish protocol. Quorum to convene a full committee meeting for the purpose of adopting policy is two-thirds (2/3) of the current general committee roster.

Changes to UPAC policies and procedures, approved by the full committee, will be effective at the beginning of the following academic year unless otherwise determined by the committee.

Policy reviews are scheduled during any part of the weekly meeting by UPAC on an as needed basis. The full committee with the Chair leading the meeting and at least one (1) advisor providing guidance as needed are required to perform a policy review. All members of UPAC are expected to attend policy reviews.

Agendas are normally set for policy reviews and are advertised via the *What's Going On Page* and the UPAC website at least one (1) week prior to the meeting. The author of the policy recommendation is expected to attend the policy review.

Policy reviews will begin with the Chair, committee members, advisors, representative(s), and members of the public gallery taking their seats. The Chair will convene the policy review and introduce the representative(s). A brief presentation and explanation from the representative(s) will be provided followed by a period of UPAC/representative question and answer. The

committee will then open the floor to brief comments from the gallery followed by a committee discussion of the policy proposal. Finally, the committee will issue final recommendations and then vote via anonymous balloting (e.g. iClicker or paper).

The committee may opt to vote in a different format; by a member making a motion, receiving a second to that motion, and achieving a majority vote (50% + 1) in favor.

The Chair has the discretion to adapt the meeting process and schedule to best suit the committee's and proposing representative(s) needs.

1.4. MINUTES

All meeting minutes are made available in the UPAC office and via the UPAC website, after notification of allocation is provided to the requestor. In the case of technology failure, you may request meeting minutes in an alternative format. To discuss the minutes, please contact the UPAC Staff Assistant to make an appointment with the Chair. If the Chair is not available, an Advisor may be able to assist you.

1.5. TERMINOLOGY

UPAC defines the following terms as:

- Academic Day: any day classes are in session. This does not include study days, final days, weekends, holidays and/or the days between semesters.
- Academic Year: the time period beginning the Monday after spring commencement through the Sunday of spring commencement the following year. The order of semesters in an academic year is: Maymester, Summer Session I, Summer Session II, Fall, and Spring.
- Addendum: request for an addition to an already approved UPAC budget request to cover unforeseen expenses not in the original budget.
- Bid: see "quote".
- Community in need: includes but is not limited to, an area of people negatively affected by a natural or man-made disaster, an area where the median household income falls within US poverty guidelines or one where the high school drop-out rate exceeds the national average.
- Honoraria: payment for a professional service for which no traditional market price exists. Examples include, but shall not be limited to, speaker fees and performance/DJ fees (riders not included). Honoraria do not include local, non-performing DJ's.
- GURU: General University Reference Utility – website referencing University policies
- Personal Networking: making contact and becoming acquainted with individuals or groups for individual or personal gain. Examples include, but shall not be limited to, career fairs, resume sessions and job/internship interviews.
- Program: any event (i.e. speaker, concert, conference, theater performance, cultural affair) that enhances the out-of-class experience provided by members of the Penn State community for students at Penn State – University Park.
- Quote: documentation specifying the details of item(s) or service(s) that is provided by the supplier that at a minimum includes, the price, quantity, and item/service description.

- Requestors:
 - Recognized Student Organizations: Recognized through the Student Affairs – Office of Student Activities.
 - Non-recognized Student Organizations: Groups of 6 or more students in a student organization that operates under a university affiliate, department, or group not officially recognized through the Student Affairs – Office of Student Activities.
 - Independent: Any full-or part-time registered University Park student currently assessed the Student Activity Fee.
 - Faculty/staff: university employees affiliated with a University Park department/unit.
- Organizations with Standing Allocation Status: a category of requesting organization that serves some type of campus-wide programming need that contributes to the well-rounded experience of all University Park students.
- Tabled: the decision to delay allocation of funds for a request or portions of a request as the result of, but not limited to, the request being incomplete, lacking pertinent information, or having discrepancies in calculations.
- Total Program Costs: the total expenses for execution of the program. Total program costs include, but are not limited to: the amount being requested from UPAC, expenses covered by any donations (community and in-kind) and expenses covered by student organization contributions.
- Travel: any activity in which students leave the University to attend or participate in an experience not provided by Penn State students or faculty. All travel must accomplish an organizational function and/or improve a service offered to all students by bringing materials and information back to University Park.
- UPAC flyers: flyers available from UPAC that are allocated during the review for program funding. These flyers are single-sided grayscale prints on colored 8.5x11 inch paper.
- What's Going On Page: published in The Daily Collegian and is used to advertise student organization weekly meetings and events at University Park. The What's Going On Page is published each Monday and Friday of the Fall and Spring Semesters. Preference is given to UPAC funded events first and based on space availability other events will be published. The Weekly Meeting List is published on in Monday's edition of the What's Going Page.

1.6. IMPORTANT POINTS OF CONTACT

The following are points of contact that may be helpful as reference throughout the UPAC process.

- ASA (Associate Student Activities): this office serves as the financial (banking, accounting, paymaster) office for student organizations. All allocations to registered student organizations will be processed through this office. The office is located in 240 HUB-Robeson Center. They can be contacted via phone at: 814-865-1947. They can be contacted via email at: asa@sa.psu.edu.
- Events Management: this office handles reservation of and setup for spaces in the HUB-Robeson Center. Contact this office if utilizing space in the HUB-Robeson Center for a program or event. The office is located in 125 HUB-Robeson Center. They can be contacted via phone at: 814-865-7973. They can be contacted via email at: hubevents@psu.edu.

- **OSA (Office of Student Activities)**: this office serves as the primary point of contact for all registered student organizations at University Park. This office monitors and assists student organizations with maintaining their status, training new officers, accessing student organization resources, and providing a variety of leadership and service programs. The office is located in 209 HUB-Robeson Center. They can be contacted via phone at: 814-863-4624. They can be contacted via email at: studentorg@sa.psu.edu.
- **Program Registration**: this office is the starting point for all registered student organizations that would like to have a program/event at University Park. They assist organizations through the process from start to finish with planning and executing an event. They provide the program registration form that is required to be signed by a program registration advisor prior to requesting UPAC funds. The office is located in: 125C HUB-Robeson Center. They can be contacted via phone at: 814-865-9273.
- **USA (Union and Student Activities) Marketing**: this office provides publicity, marketing, advertisement, and ticketing materials for student organizations. This office facilitates ticketing for UPAC funded programs as well as marketing materials for events and programs at University Park. The office is located in 231 HUB-Robeson Center. They can be contacted via phone at: 814-865-5620. They can be contacted via email at: USAmarketing@psu.edu.

1.7. REVISION HISTORY

Revision	Date Approved	Date Effective	Description
1.0	08/23/2011	08/23/2011	Revised Document
1.1	10/18/2011	05/07/2012	Addition to Section 3.2.3 - The 10% Rule Addition of Appendix J – Exception to 10% Rule Form
1.2	11/22/2011	05/07/2012	Addition of Section 4.3 – Losing Standing Allocation Status Modification of Section 3.3.4.3 – Transportation Regulations
1.3	03/13/2012	05/07/2012	Addition to Section 3.3.4.6 – Registration Expenses Modification of Section 3.1 – General Information Modification of Section 3.1.4 – Fast Track Procedure
	03/13/2012	08/27/2012	Modification of Section 3.3.1 – Guidelines
1.4	04/17/2012	05/07/2012	Modification of Section 3.1 – General Information
1.5	08/28/2012	08/28/2012	Addition to Section 1.5 – Terminology Removal of Section 3.2.2 – Deadlines Removal of Section 3.3.2 – Deadlines Modification of Section 3.1.2 – Deadlines Modification of Section 3.1.4 – Fast Track Procedure Modification of Section 3.2.3 – Honoraria Modification of Section 3.3.3.2 – Information to be submitted with request form Modification of Section 3.3.3.5 – Lodging Expenses
1.6	09/11/2012	08/28/2012	Addition of Section 2.5 – Additional Funding Limitations Addition of Section 2.6 – Students Ineligible for Funding
	09/11/2012	05/06/2013	Modification of Section 3.3.1 – Guidelines
1.7	04/09/2013	05/06/2013	Modification of Section 1.4 – Minutes Modification of Section 3.1.2 – Deadlines
	04/09/2013	08/26/2013	Modification of Section 3.3.3.1 – Academic Year Funding Caps

	04/16/2013	05/06/2013	Modification of Section 1.3.3 – Policy Review
1.8	11/12/2013	11/12/2013	Addition to Section 3.4 – Equipment
1.9	04/22/2014	05/12/2014	Modification of Section 3.3.3.1 - Academic Year Funding Caps Modification of Section 3.5 –Media Removal of Section 3.6 – Broadcast Media
	04/22/2014	08/25/2014	Modification of Section 3.3.1 - Guidelines Modification of Section 3.3.3.2 – Information to be submitted with request form Modification of Section 3.3.3.3 - Transportation Regulations Modification of Section 3.3.3.5 - Lodging Expenses

2. FUNDING RESTRICTIONS

2.1. REPERCUSSIONS OF VIOLATING POLICY

UPAC reserves the right to audit any UPAC allocation and to impose penalties for non-compliance with UPAC and SAF policies as stated in the UPAC Requestor Handbook and Constitution. These penalties may include: a warning placed in the requestor's file, reduction of future UPAC funding, and/or referral to the Student Organization Conduct Committee (SOCC). The maximum penalty imposed by UPAC will not exceed zero funding on all requests made through the end of the academic year following the infraction. Any imposed penalties will be recorded in the front of the requestor's file and kept for three years.

2.2. MAXIMUM USE OF UPAC AND SAF FUNDS

The total amount of funding from all SAF funding sources cannot exceed ninety (90%) of total program costs. Organizations with Standing Allocation status, who receive SAF funds, can combine funds with UPAC allocated organizations in order to increase funding in any given category as long as total SAF funds do not exceed ninety (90%) of total program cost.

2.3. LIMITATIONS ON SAF FUND USE

The information in this section is an excerpt from the SAF handbook. The official SAF handbook is the governing document and is available from student affairs at the following web page:

<http://studentaffairs.psu.edu/hub/activityfeeboard/>.

The purposes outlined and categories to be funded represent the places where the most progress can be made in enriching the out-of-class experience of the students in the campus community. The following should receive special attention:

1. Money may be used for wages, (preferably for students) but NOT for salaries. In some cases, wages for professional staff may be appropriate when student employees with appropriate time and/or experience are not available.
 - 1a. Activity fees may fund wages, preferably student wages, and may, only in extraordinary circumstances, fund salaries. Funding for a salaried position may only be considered if submitted directly by one of the SAFB's student representatives from UPUA or GSA with a copy of a resolution passed by the respective student government at University Park showing their support. Approval for use of activity fee money for specific salaries must be given by the Student Activity Fee Board and must be endorsed by both the Vice President for Student Affairs and the President. It is understood, however, that funding salaries with activity fee money is not the preferred means. Every effort to find alternative revenue sources to support salaried positions should first be explored before these approvals are given. The Commonwealth Campuses are still governed by Item number one above.¹²
2. The SAF should not be utilized to replace what is currently being funded by University General Funds permanently supporting programs/services/equipment/activities; however, on a case-by-case basis and with the recommendation and concurrence of the allocation

¹² Revision adopted 3/27/09

committee of that campus, an exception can be made. Campuses should have flexibility, but must be faithful to the principle of not using SAF income to support what is currently being funded by General Funds. The SAF can be used no less than three (3) fiscal years after University General Funds no longer support these initiatives.*

**Exception: Beginning with the fall semester 2008, each campus SGA may elect to allow student activity fee funds to replace the General Funds allocation from the 189-50 CO budget. SGAs may approve the use of General Funds to provide or expand salaries for fixed term multiyear positions which support Student Affairs or any co-curricular student service. In return, the SGA will automatically receive at least the equivalent of their General Funds plus the equivalent percentage increase to the Student Activity Fee for that year. The SGA however, will not be automatically granted the percentage increase should student enrollment as defined by the FTE (Full Time Equivalent) at that campus decreases from the previous year. In that case, any increase to the SGA Allocation will be determined by the campuses SAF Allocation Committee. The traditional Student Activity Fee Board restrictions as to how those funds can be spent will be waived so long as expenditures fall within general University budget and accounting guidelines.¹³*

3. These funds should not be used for major renovations and/or construction of new buildings (discussion needed regarding % of fee that can be used and time limit).
4. Funding CANNOT be discriminatory, arbitrary, or capricious.
5. No person or sponsoring organization may make a profit from a SAF sponsored event. With the approval from the sponsoring organization a group may sell a commodity or fund raise at a SAF sponsored event.
6. Requestors must use SAF funding in the manner in which they were allocated.
7. Activities sponsored by the SAF must be open to all University students at the location that is funding the event.
8. The SAF cannot be transferred to any General Funds budget.
9. Individual chapters recognized by IFC, NPHC, MGC, and PanHellenic Council are eligible for funding only when the event is open to the entire University population.
10. Clothing is an allowable expenditure but the requester must show; 1) how the item(s) enhance the out of-class experience, 2) all students must have equal access to items being offered. The exceptions are items such as uniforms that must be returned to the University at the end of the season or fiscal year.
11. One registered student organization may conduct approved fund raising activities at SAF supported events providing the main purpose of the activity being supported by the fee is not fund raising and the event is free and open to the University community. A student who attends said event and does not donate must be able to gain the same experience from said event as someone who donates to the fundraiser and attends said event. All proceeds from the fundraiser must go towards a charity or philanthropy as defined by the IRS, and in the case of a US based organization, has 501c3 tax exempt status or a recognized student organization of the Pennsylvania State University.*¹⁴The registered student organization wishing to fund raise at an event supported by the SAF but sponsored by another registered student organization MUST have the permission of the sponsoring registered student organization to fund raise at the event. The sponsoring registered student organization of the event will have the final determination in the selection of the group to conduct the fund raising activity. All fund raising activities must be approved in advance by the Campus

¹³ Revision adopted 4/16/10

¹⁴ Revision adopted 10/30/09

Allocation Committee and follow the procedures outlined in Policies and Rules for Student Organizations.

12. Definition of Co-Sponsorship – The University Park Undergraduate Association (UPUA) and the Graduate Student Association (GSA) will have the option of using portions of their budget to Co-Sponsor. Co-Sponsorship, as pertaining to UPUA/GSA, is the ability to put on an event or initiative in conjunction with another student organization, entity, or off campus establishment (i.e. the Borough Council).¹⁵

UPUA/GSA must take part in the planning of any event for which they are a co-sponsor. Organizations must go before these student governments and ask them to cover specific expenses of their program. UPUA/GSA may not provide a lump sum of money to any organization. The UPAC Chair must be invited to the General Assembly for the deliberations concerning co-sponsorships, but may opt to send a representative in his/her place. The student governments must submit, in writing, to UPAC the items for which they will cover expenses. The student governments must pay for that item directly and may not release these funds directly to the student organization. UPUA/GSA may not co-sponsor after a program/event has taken place. The Student Activity Fee may only be used to support a program in accordance with UPAC's current caps (currently 80% of the total program costs).

If for some reason the UPUA/GSA's sponsorship is not known at the time of a UPAC allocation, the other sponsor must submit their involvement to UPAC so that UPAC can adjust the allocation accordingly. Funds allocated by UPAC will not be released to their ASA restricted account until UPUA/GSA submits this documentation.

UPUA/GSA and CCSG may co-sponsor each other's events throughout the year as the three governing bodies without this rule applying since they will not be going to UPAC for funding. Co-Sponsorship of travel expenses and equipment may not be considered.

Additional Policies:

-Programs conducted at UP must be open first to University Park students before any non-Student Activity Fee paying member may be allowed in to the event.

-Transfer of funds is not permitted from one organization to another.

-Any organization receiving funds directly from the Student Activity Fee Board may not come before UPAC for additional funding. They may, however, submit requests to UPAC to advertise in the *What's Going On* page of the Daily Collegian.

2.4. ITEMS THAT WILL NOT BE FUNDED

The information in this section is an excerpt from the SAF handbook. The official SAF handbook is the governing document and is available from student affairs at the following web page:

<http://studentaffairs.psu.edu/hub/activityfeeboard/>.

¹⁵ Addition 1/20/09

1. Appropriations in furtherance of a political campaign or activity by any candidate or candidate's staff for political office.
2. Appropriations to a legislative lobby or to a registered student organization whose primary purpose is to influence legislation.
3. Grants-in-Aid, scholarships, salaries, or stipends.
4. Donations or charitable contributions of money or products.
5. Funding of philanthropic activities where the primary purpose is fundraising.
6. Retroactive events (events held prior to submitting the request for funding or events where funding has been committed before being notified of approval).
7. National association memberships on a per person basis. Individual memberships are not permitted; however, group memberships to a national organization are allowed.
8. Membership dues for fraternities or sororities.
9. Hiring of legal services or providing bail-bond funds.
 - a. Exemptions to this policy are restricted to the UP campus and are defined in section B, page 11.
10. Honoraria for Penn State Faculty or Staff speaking about his/her area of expertise.
11. Expenditures which do not fall explicitly within AREAS TO BE FUNDED unless approved by the Vice President for Student Affairs or his/her designee.
12. Purchase of a specific gift for a specific person or items used to fundraise. This means that promotional items for events, door prizes, and participation prizes that are distributed randomly are allowable expenses to purchase with the SAF.
13. Personal, non-contractual gain of any student, faculty member, staff member, or any other person.
14. Purchase of or reimbursement for the purchase of alcoholic beverages.
15. Any religious ceremony or worship service, except when such activity is for educational purposes.
16. Any activity, material, or program whose primary purpose is recruitment or increased membership in the sponsoring group.

All expenditures must be in compliance with **University Policies and Rules** and **Policies and Rules for Student Organizations**.

The Pennsylvania State University prohibits discrimination and harassment against any person because of age, ancestry, color, disability or handicap, national origin, race, religious creed, sex, sexual orientation, gender identity, or veteran status. Discrimination or harassment against faculty, staff or students will not be tolerated at The Pennsylvania State University.

2.5. ADDITIONAL FUNDING LIMITATIONS

The following items will not be considered for funding by UPAC:

- All medications including off-the-shelf and over-the-counter medications with or without a prescription.
- Expenses for advisor, staff, and faculty travel.
- Health insurance, travel insurance, or health provider expenses.

2.6. STUDENTS INELIGIBLE FOR FUNDING

Graduate students enrolled in course numbers 601, 610, or 611 are not normally assessed a Student Activity Fee. Provided these students have not otherwise been assessed the student activity fee, they are ineligible for UPAC funding.

3. GENERAL ALLOCATION REQUESTS

General allocation requests consist of the following types of requests: Program, Travel, Equipment, Print Media, Broadcast Media, and Operational expense.

3.1. GENERAL INFORMATION

All required items within a request form must be complete (all line items applicable to the request form are filled out with all supporting documents attached). The budget will be considered accepted once a UPAC affiliate signs in the budget request form. UPAC will follow a first come, first serve procedure when scheduling requests for review. Requests will be considered in the order received by UPAC as the first order of priority. Additionally, requests will be considered in the order approved for review by the Chair as the second order of priority. Incomplete requests will not be scheduled until the Chair has determined that all required items have been submitted to UPAC.

All required documentation submitted with the request must be in the form of US dollars and may not be converted from other currencies by the requestor. All quotes must come from service providers.

3.1.1. POINT OF CONTACT

When a requestor signs out a form to request program, equipment, media, or travel funding from the UPAC office, a UPAC member from the Student Contact Team (SCT) is assigned to work with the requestor. The SCT member provides a point of contact and assistance with any concerns or questions about the general allocation request. It is imperative that the requestor and SCT member meet to discuss the request. The SCT member will represent the requestor and advocate on their behalf to one of the allocation teams. The requesting individual or group representative is encouraged to be present at the meeting to answer questions. The SCT member is expected to contact the requestor within three (3) academic days of signing out a request. It is also the responsibility of the requestor to be in touch with the SCT member. In the event that your organization has not been contacted, please contact the UPAC office.

3.1.2. DEADLINES

All requests must be complete to be accepted for review. After deadlines have lapsed, incomplete budgets may be turned down at the discretion of the Chair and that request may not be resubmitted for funding. Requestors must meet with their assigned UPAC SCT member to assure completion prior to deadlines. A deadline of forty (40) academic days prior to the experience date applies to all program and travel requests. A deadline of forty (40) academic days prior to the last academic day of the spring semester applies to all other requests.

3.1.3. MISCELLANEOUS EXPENSES

UPAC does not fund miscellaneous expenses (i.e. emergency expenditures, unforeseen expenses, last minute details, etc.). All expenditures being requested must be line-itemed and supported with proper documentation.

3.1.4. FAST TRACK PROCEDURE

The UPAC Chair reserves the right to review budget requests as a “fast track” review, should the budget meet the following criteria:

- The requestor has submitted a request to UPAC in the previous or current academic year.
- The allocation does not exceed \$10,000.
- The Chair allocates full funding based on UPAC policy.
- The UPAC advisor approves the Chair’s allocation.
- The approved allocation is presented to the UPAC Leadership Team.

Any budget that does not meet the above criteria will be scheduled for a full review with an allocation team.

3.1.5. ADDENDA

When additional or unforeseen expenses arise, a requestor may submit an addendum. Requestors must submit a letter to UPAC that explains the costs and the rationale for the additional request. UPAC will only consider additional allocations for expenses that are necessary for the success of the program/travel, have increased since the allocation was made, and were not originally submitted/included/considered during UPAC’s previous reviews of the budget.

UPAC requires that notification of any changes to the event be submitted in writing at least ten (10) academic days before the start date of the event. Failure to do so may affect the funding of the event. It is strongly encouraged that requests are submitted as early as possible.

Organizations with Standing Allocation status are not allowed to submit addendum requests.

3.1.6. TABLING

An entire request or portions of a request may be tabled for a number of reasons including, but not limited to, the request being incomplete, lack of pertinent information, and discrepancies in calculations.

When items are tabled, they are set aside. No money has been allocated toward these tabled expenses. Once the issue for tabling has been remedied, proper documentation must be submitted to the UPAC office at least ten (10) academic days prior to the event. At this time, another hearing will be scheduled for the tabled items to be removed from the table and will be reviewed by the committee. When items are brought back from the table, the items may be reviewed without the need of the requestor to be present unless the requestor would like to attend or the sub-committee requests their presence. If updated information for the tabled item(s) has not been submitted within the ten (10) academic day deadline, the tabled items may be removed and considered ineligible for UPAC funding.

3.2. PROGRAMS

Prior to signing out a UPAC program funding request form, requestors must start with the program registration form available in 125 HUB–Robeson Center or online at <http://reservations.psu.edu>. Once this form is completed and signed by a program advisor, a program funding request form may be signed out from UPAC.

Program request forms must include appropriate materials including a quote for the honoraria, honoraria biography and reviews, venue confirmation, banner space confirmation and bids for all items to be purchased or rented, as stated on the *Request for Program Funding* sample form that is provided in Appendix A – Program Request Form section. A total budget must be submitted with your program request including documentation and bids for non-requested or non-fundable items for the program.

3.2.1. GUIDELINES

UPAC defines a program as any event (i.e. speaker, concert, conference, theater performance, cultural affair) that enhances the out-of-class experience provided by members of the Penn State community for students at Penn State – University Park.

UPAC will not consider funding for events that are not open to the entire University Park student body

The SAF Board and UPAC limit funding of events sponsored by the Interfraternity Council (IFC), Panhellenic Council (PHC), National Pan-Hellenic Council (NPHC), or Multicultural Greek Council (MGC) to those that are open to the entire student body and are held in locations other than fraternity houses or sorority suites.

3.2.2. THE 10% RULE

Requestors are responsible for a MINIMUM of ten percent (10%) of their total program cost. Any requests for exceptions must be included in the original request.

The following are guidelines that should be followed to request an exception:

- Provide documentation indicating that the requestor has insufficient funds to ensure the success of the proposed event.
- Provide documentation indicating source(s) of current funding other than SAF funds, if any.
- Provide documentation indicating source(s) that have declined funding the proposed program.
- Indicate recent external funding source(s) for other requestor activities, if any.
- If the program is a recurring event, indicate previous year(s) funding source breakdown(s) as percentage of total program expenses. Specifically, itemize any non-SAF funds expensed.

The committee will review and discuss the exception request during the normal allocation review process. It is suggested that the requestor provide any information that supports their ability to raise funds and to follow through with program requests.

It is the responsibility of the requestor to indicate and support the exception with the original request. This exception is not eligible for addendum.

3.2.3. HONORARIA

An organization is eligible to receive up to four (4) honoraria per academic year. No student group may be funded for more than \$20,000 in honoraria during an academic year. An organization may be funded a maximum of one (1) honorarium for \$20,000.00 or up to four (4) honoraria at a

combined price of \$20,000. Discount towards honorarium will not be considered towards total program cost.

One (1) day events are eligible for a maximum of four (4) honoraria recipients not to exceed \$20,000, regardless of the number of cosponsoring requestors. UPAC discourages funding for honoraria recipients who have performed at University Park campus within the last twelve (12) months.

All recognized student organization general allocation requestors may request to utilize up to \$500.00 of their yearly honoraria allotment to cover hospitality riders as stated in the contract for honoraria recipients. If this item is an addendum to a previous request, it must go through the Fast Track review process. Additionally, no support staff is eligible for UPAC funding.

Lodging expenses are considered for honoraria recipients only. Lodging exceptions may be considered based on technical and mechanical personnel required for staging. Lodging expenses for honoraria recipients are capped at \$100/room per night.

When requesting funds for honoraria, the detailed program schedule should include the expected performance time for each honoraria recipient.

3.2.4. INTERNATIONAL HONORARIA RECIPIENTS

If honoraria recipients are eligible to receive payment or reimbursement for expenses under United States law, then UPAC will consider funding the honoraria.

Requestors bringing in international honoraria recipients must work with a University Department willing to verify valid visa and passport information and willing to cover the expenses of the honoraria recipient and then subsequently be reimbursed from the sponsoring organization with UPAC funding. A letter from the department stating that they have verified required visa and passport documentation and agree to the above must be attached when submitting the request.

A University Department may incur expenses for which they expect to be reimbursed only after a requestor has been notified of funding by UPAC. The University Department must submit, on letterhead, a list of incurred expenses plus a copy of the respective receipts to the sponsoring student organization in care of the Associated Student Activities Office (ASA) located in 240 HUB-Robeson Center. The department will be reimbursed by the sponsoring student organization. For independent requestors and non-recognized student organizations, the department may submit the request for reimbursement directly to the UPAC staff assistant.

UPAC does not allocate funds towards travel outside of the 48 contiguous United States or the District of Columbia. UPAC will consider transportation for international honoraria recipients once they are within the 48 contiguous United States or the District of Columbia.

3.2.5. FACILITY AND EQUIPMENT RENTAL

A confirmation of venue reservation must be attached to the request.

If requiring equipment and/or services through the Office of Physical Plant (OPP), a requestor must work directly with the Events Management Office in 125 HUB-Robeson Center to secure quote(s). This would include such things as: electrical needs, stages, risers, tables, chairs, etc.

If renting equipment from an outside vendor, a copy of the written quote is required to be submitted with your request.

3.2.6. CLOTHING / COSTUMES / APPAREL/SET DESIGN/PROPS

The following has been established by the Student Activity Fee Board:

Clothing is an allowable expenditure but the requester must show: 1) how the item(s) enhance the out-of-class experience, 2) all students must have equal access to items being offered, the exception being items such as uniforms, which must be returned to the University at the end of the season or fiscal year.

UPAC may consider requests for costumes only (purchase, rental, and cleaning).

An annual inventory list must be submitted by the last day of classes of the spring semester. UPAC will not consider new requests until an inventory list has been received in the UPAC office.

3.2.7. FOOD EXPENSES

UPAC will not fund food or food-related expenses for programs. If UPAC allocates funds for the program of which food is a part and there is a charge for the food, then the food portion must be optional part of the program and students should not be charged or should have a lower ticket price to attend.

3.2.8. PROGRAM MATERIALS / PROGRAMS / RECEPTIONS / AWARDS / PRIZES / DECORATIONS

UPAC will consider items that meet all of the following criteria:

- (1) are used for educational purposes,
- (2) include some information essential to program participation, AND
- (3) are integral to the success of the program.

UPAC does not fund gifts that can be considered awards. This can include, but is not limited to: awards, honors, trophies, bouquets, donations, scholarships, or stipends.

The following has been established by the Student Activity Fee Board:

"The fee CANNOT be used to purchase a specific gift for a specific person or items used to fundraise. This means that promotional items for events, door prizes and participation prizes that are distributed randomly are allowable expenses to use the Student Activity Fee."

3.2.9. PUBLICITY

All advertising related to events funded by UPAC must prominently display the official UPAC logo or the phrase "Funded by UPAC - Your Student Activity Fee at Work." Exceptions may be granted if doing so would add additional costs, or would otherwise cause unreasonable hardship. UPAC logos are available on the UPAC website.

UPAC will not consider funding advertising in any print media including but not limited to *The Daily Collegian* (Collegian Inches) or *Centre Daily Times*. UPAC does encourage use of the weekly *What's Going On Page*, which is funded by UPAC. The *What's Going On Page* appears Mondays and Fridays

in *The Daily Collegian*. The *What's Going On Page* is used to advertise upcoming events as well as a weekly meeting list. The Weekly Meeting List is only published on Monday's *What's Going On Page*. Forms are available in the UPAC office. Refer to Appendix G – *What's Going On Page* Submission Form of this document for a sample of the submission forms. Deadlines to submit information is the Monday of the week prior to the event date.

Any requests for other forms of publicity other than UPAC flyers (color flyers, posters, banners, etc.), must be accompanied by a bid for the desired item plus two (2) comparable bids for the same item.

All UPAC funded events are eligible for one colored poster through the Union & Student Activities (USA) Marketing Office. Banners and additional posters may also be purchased. For more detailed information you may contact the USA Marketing office.

3.2.10. TICKET SALES

For all events requiring a fee/ticket for admission, all University Park student fees/tickets must be less expensive than that of all other attendees (including children). University Park students must be given first priority for ticketed events/activities.

Once tickets have been printed, you will be notified that the tickets and a ticket accountability form will be available for pick up in the ASA Office. The ASA Office staff will explain the accountability procedures for the distribution of tickets and the deposit of tickets sales funds.

Within forty (40) academic days of the completion of a ticketed, UPAC-funded event, the requestor must submit a reconciliation of all revenues and costs associated with the event to the UPAC office. The reconciliation must include documentation of revenues from the box office (if group uses a university-supported box office or an off campus box office). It must also include documentation from ASA indicating the costs of the event. If reconciliation is not submitted within forty (40) days and any excess revenues up to the amount allocated are not returned to UPAC, UPAC reserves the right to limit future requests until the account is reconciled. A hold will also be placed on their restricted ASA account until the reconciliation is submitted and the funds returned.

3.2.11. DATES OF EVENTS

UPAC considers funding of programs which occur during times when students are required by the University to be at University Park. UPAC May consider funding for programs that occur before classes begin for a semester or session with those allocations deducted from the following semester's fund.

In accordance with the University Policies and Rules for Student Organizations, "no recognized student organization may schedule or sponsor any events on or off campus beginning at 8 a. m. Saturday after the last day of classes through 8 a. m. the Monday following final exams. This does not include participation in events scheduled by conference, regional, or national affiliates." For more information regarding this policy please refer to:

<http://studentaffairs.psu.edu/organizationrules/>.

3.3. TRAVEL

All requests must be complete to be accepted for review. Travel requests must include a published description and itinerary of the conference (or comparable description and itinerary from a previous year); complete breakdown of costs, a roster of students as well as all required travel related quotes as stated on the *Request for Travel Funding* sample form available in Appendix B – Travel Request Form.

3.3.1. GUIDELINES

UPAC will consider funding Educational, Competitive, Performance, and Service experiences as defined further in this handbook. Certain restrictions may be placed on items eligible for funding in regards to these experiences, as defined in this handbook.

UPAC will only consider funding for travel where the students attending will be taking an active role in the travel experience. A student traveling for the purpose of presenting their personal research is not eligible for UPAC funding for the date(s) that they are presenting their own research, as the travel experience would result in personal gain that is essential for academic progress. Ineligibility only applies to the student(s) involved with presenting their own research and may not affect other students attending.

The primary focus of events away from the University Park campus cannot be entertainment, community building, personal networking, career fairs, proselytizing, group retreats, conducting and/or presenting research, and/or lobbying.

UPAC will consider requests for travel to all destinations not on the US State Department Travel Warning List.

UPAC will consider requests with the following restrictions:

- All travel expenses (transportation, lodging, and registration) will be considered within the United States of America and the District of Columbia.
- Only transportation expenses will be considered outside of the United States of America and the District of Columbia.
- UPAC will have full discretion when determining funding for the number of students traveling.

3.3.2. TRAVEL EXPERIENCE CATEGORIES

All travel requests must fall within at least one of the following categories:

- Educational - The primary purpose is for students to gain knowledge or insight that will enhance the out-of-class experience such as a conference, field trip, or other cultural experience.
- Competitive - The primary purpose is for students to apply knowledge or skills in a competitive manner in pursuit of recognition.
- Performance - The primary purpose is for students to demonstrate skills or abilities for an audience in an informative or entertaining manner.

- Service - The primary purpose is for students to volunteer assistance where the primary beneficiary is a community in need. UPAC will not fund trips in which the student organization will be providing a service to its parent organization.

3.3.3. TRAVEL PROCEDURES AND REGULATIONS

3.3.3.1. ACADEMIC YEAR FUNDING CAPS

UPAC may fund up to a total of \$5,000.00 towards travel requests per organization (recognized or non-recognized) as defined by the UPAC Requestor Handbook, per academic year. UPAC may fund up to a total of \$500.00 towards travel requests per independent requestor, per academic year.

Individual students are eligible for UPAC funding for up to two (2) travel experiences per academic year, regardless of the number of student organizations in which they participate. If individual organizations choose to take more students than the number for which UPAC allocated funding, the organization must specify which students will be the beneficiaries of the funding. Should an organization fail to specify the beneficiaries, all students on the final roster will have that experience counted as one travel experience.

3.3.3.2. INFORMATION TO BE SUBMITTED WITH REQUEST FORM

- UPAC expects that a requestor provide as much detail as possible regarding the need for the travel allocation.
- Information describing travel experience should be provided as part of the requesting materials. This information should be confirmed by the travel experience provider.
- A roster of all students intending on participating in the experience. All students who request travel funding, must commit to the trip by submitting their name as part of a roster with the original request.
- Written justification for each person wishing to travel. UPAC will take into consideration the necessity to bring back different perspectives from these experiences to the University Park community.
- A published description of the itinerary or comparable itinerary from last year.
- Airline quotes and vehicle rental (unless fleet service) must be obtained from nationally recognized sources or travel agencies. Charter bus quotes must be obtained from the University approved vendor listed at:
<http://www.controller.psu.edu/Divisions/RiskManagement/vendors/buslines/>.
- If requesting funding for fleet vehicle expenses, provide the name(s) of the university approved driver(s) of each vehicle.
- An estimate of the round trip mileage to the location if using fleet or personal vehicles.
- A complete itemized breakdown of all costs.
- Registration quote(s).

3.3.3.3. TRANSPORTATION REGULATIONS

- UPAC will consider funding up to seventy-five (75%) of the total transportation costs.
- All students traveling, regardless of UPAC funding, must be included on the official University Student Travel Registration Form.

- Airline quotes and vehicle rental (unless fleet service) must be obtained from nationally recognized sources or travel agencies.
- Charter bus quotes must be obtained through a university approved carriers. A complete list may be found at:
<http://www.controller.psu.edu/Divisions/RiskManagement/vendors/buslines/>.
- Funding may be provided for both passenger vehicle/truck rental and mileage if mileage is not already included as part of the passenger vehicle/truck rental fee and will be considered at the supplier's current mileage rate. Fleet rental and mileage will be considered at the current Fleet Services rate. Personal mileage reimbursement will be considered at the current UPAC rate.
- The Student Travel Registration Form is required to be submitted to 230 HUB-Robeson Center no less than three (3) business days prior to your date of departure. The form will be attached to your allocation results email and is also available in 230 HUB-Robeson Center. In order to be considered complete, refer to the form for the documentation required for each student traveling, regardless of UPAC funding. Once this form has been submitted and approved your UPAC allocation letter will be released to the ASA Office within two (2) business days. Failure to submit the form prior to your date of departure will have an impact on the funds being released as well as the ability to be reimbursed for any travel related expenses, regardless of UPAC funding.

3.3.3.4. TRAVEL DEPOSITS / RESERVATIONS

UPAC will consider allocating funds towards travel or travel-related reservations/deposits so long as the requester can provide proof that the expenditure(s) can be fully refunded to them by the date of funding notification from UPAC. If not fully refundable, UPAC can consider only the refundable or unpaid portions.

3.3.3.5. LODGING EXPENSES

UPAC may consider the funding of lodging expenses up to \$50.00 per student per night when lodging is not included as part of registration.

3.3.3.6. REGISTRATION EXPENSES

Registration fees are capped at \$100.00 per person. UPAC will not consider registration expenses that only include food (refer to 3.3.3.7). However, if a registration fee exceeds the \$100.00/person cap and is inclusive of the cost of lodging, the cap may be adjusted, based on proper documentation, to allow for these inclusions. Any tickets to additional trips, excursions, seminars, events or similar activity may be considered only up to the \$100.00 per person cap.

3.3.3.7. MEAL EXPENSES

UPAC will not allocate per-diem meal expenses. However, UPAC will consider meal costs that are part of the event and included within the registration fee up to the UPAC allowable amount. Any meal costs beyond those included in the registration fee up to the UPAC allowable amount are the responsibility of the individual(s) incurring the costs.

3.3.3.8. SPRING BREAK TRAVEL

UPAC requires that all spring break trips be in accordance with the group's mission statement and purpose and must fit within UPAC's criteria.

3.3.3.9. CHANGE IN NUMBER OF STUDENTS TRAVELING

If the number of students traveling decreases from the original amount allocated, the organization must submit in writing the change in number to the UPAC office. The allocation will then be changed to reflect the correct number of students traveling and a revised allocation letter will be submitted to the ASA office. A failure to do so may result in the student organization reimbursing UPAC. A decrease in students may or may not mean that the organization is no longer entitled to the original allocation.

3.3.3.10. REGULATIONS REGARDING AIRFARE & AIR TRAVEL

Airfare booking

Once notified of the allocation results, requestors have six (6) calendar days to book tickets. In the event that the price increases, UPAC may consider adjusting the allocation based on the actual price. After six (6) calendar days, the organization will assume full responsibility for any price increase. Should the airfare rate decrease at the time of booking, the allocated amount will be reduced to no more than seventy-five (75%) of the documented price.

Submission of cancelled boarding passes

All students traveling by air are required to submit their cancelled boarding pass to UPAC within five (5) academic days of returning from the experience. If a student does not submit a boarding pass, it will be treated as an unused ticket and could result in the reimbursement of allocated funds to UPAC.

Cancelled and unused air tickets

All students who commit to the trip by submitting their name as a part of the required roster with the original request and have been funded are expected to attend the experience. If a student should cancel or choose not to attend, therefore wasting an airfare, the student organization account will be charged for the amount of the unused ticket. If an independent requestor does not use the ticket, the requestor will be financially accountable to UPAC.

3.3.3.11. INTERNATIONAL TRAVEL

All students traveling outside of the 50 United States and the District of Columbia must follow the University procedure for international travel. The guide for this procedure is available at <http://studentaffairs.psu.edu/hub/studentorgs/pdf/InternationalTravel.pdf>.

UPAC does not release funds for international travel allocations until the international travel experience is approved by the University.

3.4. EQUIPMENT

UPAC will consider funding expenses that aid an organization in completing their primary purpose. These expenses include costs associated with equipment to aid in this process.

Organizations are eligible for up to \$5,000.00 per academic year.

If an organization is requesting the purchase of equipment, they must submit a request for equipment purchase form detailing what type of equipment is desired and why this equipment needs to be purchased. A sample of this form can be found in the Appendix C – Equipment Request Form section.

The following documentation is required:

- Three (3) bids for each item must be attached to the request for equipment.
- UPAC requires that all equipment purchased must be secured in a University approved storage space (excludes on campus student housing). Please submit a letter from the department stating that you do have assigned office space with your request.
- A copy of the mission statement must be attached to the request for equipment.

Equipment such as copiers, copier maintenance, faxes, printers, furniture, etc. will not be considered for funding by UPAC.

No student organization or Organizations with Standing Allocation status may charge a fee for use of UPAC funded equipment.

An annual inventory list must be submitted by the last day of classes in the spring semester. UPAC will not consider new requests until an inventory list has been received in the UPAC office.

Any equipment purchased with SAF funds must be disposed of via Lion Surplus. Contact the UPAC office before disposing of any equipment purchased through this request/allocation.

3.5. MEDIA

UPAC will consider funding media expenses which aid an organization in completing their primary purpose. Media expenses include materials being distributed to University Park students and expenses associated with the production of that content.

Organizations are eligible for a contribution of up to \$10,000.00 per academic year.

When requesting media expenses, requestors must submit documentation of the costs associated with each expense. A minimum of three (3) independent, official bids must be attached to the request for each media production expense. A sample of the request form is available in the Appendix D – Media Request Form section.

All content for public distribution must include the following items. Exceptions may be granted if doing so would add additional costs or would otherwise cause unreasonable hardship.

- A disclaimer of: “The content and opinions of this publication reside solely with the authors and not with the Pennsylvania State University or the University Park Allocation Committee.”
- The UPAC logo or the phrase “Funded by UPAC! – Your Student Activity Fee at Work” must be prominently displayed. UPAC logos are available on the UPAC website.

When funds are allocated for media publications:

- Prior to funds being released, a copy of a proof verifying that a **UPAC logo** and **disclaimer** are properly included in their entirety must be provided to the UPAC office for review and approval.
- A final version of each publication must be provided to UPAC once published. If the final material does not include the required information, UPAC reserves the right to revoke future funding to the requesting organization.

A list of the Board of Directors (including faculty, staff and students) must be submitted to the UPAC office each academic year. For more information regarding the Board of Directors, please refer to the Policies and Rules for Student Organizations which can be found at:

<http://studentaffairs.psu.edu/organizationrules/>.

3.6. OPERATIONAL

UPAC provides organizational operational funds to recognized student organizations to aid in their basic operating expenses. Student organizations may only submit one (1) operational request per academic year. When a group exhausts these funds, it is the group's responsibility to cover any remaining organizational expenses for the academic year.

All recognized student organizations are currently eligible to receive a \$50.00 allocation per academic year. Requests must be submitted by the last day of classes of the fall semester. Exceptions exist only for newly recognized organizations in the spring semester.

Valid expenditures include:

- Advertising - recruitment, officer elections, member retention, general publicity
- Office Supplies - pens, paper, etc.
- Postage - mailings
- Copying - organization newsletters, minutes, officer elections

Funds cannot be used towards event expenses, travel expenses, or the purchase of equipment, food or beverages. Student organizations must abide by all UPAC policies. For questions or clarification regarding the use of these funds, please contact the UPAC office.

Funds allocated towards student organizations' operations expenses can be used during the fall and spring semester, and must be expensed no later than the last day of classes of the spring semester. Any remaining funds will be returned to UPAC. A sample of the request form is available in the Appendix E – Operational Request Form section.

3.6.1. STAFFING EXPENSES

UPAC does not consider requests for wages related to the staffing or operation of an organization or university unit.

3.6.2. TELEPHONE EXPENSES/FAX MACHINE AVAILABILITY

UPAC supports phone access for select student organization offices primarily located in the HUB-Robeson Center. The UPAC Chair, with the advice of the UPAC Leadership Team, will select the organization offices that will be granted telephone service support. The need of these offices for telephone service support will be reviewed annually. UPAC will cover the monthly equipment and line rental charges. Usage charges are the responsibility of the student organization. Groups may not request additional or private phone lines or fax lines from UPAC.

The UPAC office has a fax machine available to all students to use for student organization communications.

4. STANDING ALLOCATION REQUESTS

A Standing Allocation is one in which the organization serves some type of campus-wide programming need that contributes to the well-rounded experience of all University Park students. Organizations with Standing Allocation Status must have the capacity to follow through with their funding requests. Organizations with Standing Allocation Status are eligible to receive UPAC funding for their campus-wide programming expenses.

4.1. CURRENT STANDING ALLOCATIONS

The following is a list of UPAC approved Organizations with Standing Allocation Status.

- Bryce Jordan Center
- Center for Performing Arts
- Center for Women Students
- Child Care Subsidy
- LGBTA Resource Center
- Office of Student Activities
- Office of Student Orientation and Transition Programs
- Paul Robeson Cultural Center
- Recreation Sports
- Student Programming Association (SPA)
- Student Organizations with Standing Allocation Status
 - Homecoming
 - Movin' On

4.2. ATTAINING STANDING ALLOCATION STATUS

Requestors may be considered as an Organization with Standing Allocation Status if they meet the following criteria:

- Submit a formal petition to the Chair of UPAC in writing before December 1st for the following academic year requesting a change of allocation status to standing.
- The organization is university affiliated or a recognized student organization.
- The organization has the sole purpose of serving a campus-wide programming need that contributes to the well-rounded experience of all University Park students
- Has the capacity to follow through with requests.
- The organization receives a two-thirds (2/3) vote from UPAC in favor of granting the organization as an Organization with Standing Allocation Status.

4.3. LOSING STANDING ALLOCATION STATUS

Student organizations with standing allocation status may lose their standing allocation status if any of the following criteria:

The student organization with standing allocation status

- submits a formal petition to the Chair of UPAC in writing prior to December 1st requesting a change of allocation status to general, effective the beginning of the next academic year.

- violates UPAC or SAF policy.
- fails to execute the program for which funds were requested and approved.
- fails to submit a budget proposal in a timely fashion.
- no longer has the sole purpose of serving a campus-wide programming need that contributes to the well-rounded experience of all University Park students.

The organization will be notified by the UPAC Overall Chair if any of the previous criteria are met, if the UPAC Leadership Team will be proposing the removal of the organization's standing allocation status, and when the information will be presented to a full UPAC committee. The organization will be given the opportunity to address the committee pertaining to the proposed removal of the organization's standing allocation status and may be asked questions by the committee members. The committee will discuss and debate as needed, followed by a closed voting session. A two thirds (2/3) vote is required. If standing allocation status is lost, the status transition will be effective at the beginning of the next academic year.

Student organizations that lose standing allocation status are eligible to submit general allocation requests. An organization may submit to regain standing allocation status the following academic year using the procedure outlined in this document.

4.4. BUDGET REGULATIONS

Organizations with Standing Allocation Status must submit a projected budget for their planned expenses. Exact bids will not be required but should be included, if available. Requestors must also submit details relating to their previous year's SAF expenditures.

The amount allocated to Organizations with Standing Allocation Status may not be decreased by more than ten percent (10%) of the previous year's allocation. An allocation reduction of more than ten percent (10%) requires a vote of two-thirds (2/3) majority of the members present during the allocation review, unless the requested amount has been voluntarily decreased by the requestors. Items that were stipulated as a one-time contribution will not be considered in the ten percent (10%).

UPAC program and equipment caps for general allocation requests are not applicable to Organizations with Standing Allocation Status unless otherwise noted.

If the Organization with Standing Allocation Status, except a recognized Student Organization with Standing Allocation Status, is requesting travel funds specifically for their student leadership, they will be held to the current UPAC travel cap, but not to the transportation expenses, registration/hotel caps, or three (3) travel experience limit. For travel provided through an Organization with Standing Allocation Status to students at the University at large, individual students attending will be required to cover at least twenty-five percent (25%) of their travel experience expenses. SAF funds may only be used for students.

Organizations with Standing Allocation Status are not eligible to submit an addendum to their original request and are not eligible to submit additional funding requests.

All Organizations with Standing Allocation Status inclusive of their respective subsidiaries and related programs are eligible to use a grand total of \$5,000.00 of their honoraria allocation per academic year for honoraria related food expenses if stated in the honoraria contract.

4.5. HONORARIA CAPS FOR ORGANIZATIONS WITH STANDING ALLOCATION STATUS

For Student Organizations with Standing Allocations status, the honoraria request will not exceed \$250,000.

4.6. COLLABORATION

Organizations with Standing Allocation Status are eligible to collaborate with other groups and have co-sponsors but must follow the applicable SAF co-sponsorship/collaboration rules. Refer to the Student Activity Fee Handbook available at:

<http://studentaffairs.psu.edu/hub/activityfeeboard/>, definition of Co-sponsorship. Section D, subsection 12.

5. ACCESSING FUNDS ALLOCATED BY UPAC

5.1. REQUESTORS WITH ASSOCIATED STUDENT ACTIVITIES ACCOUNTS

UPAC releases funds allocated to student groups through the office of Associated Student Activities (ASA). When funds are allocated, a restricted version of the student organization's account will be set up by ASA. All UPAC funds will be deposited in this account.

Your UPAC allocation letter is an official document defining the funds that have been allocated and the restrictions to those funds. ASA will receive a copy of your allocation letter for reference. Consult the Treasurer's Guide provided by ASA for further policies and procedures concerning disbursement of funds.

5.2. REQUESTORS WITHOUT ASA ACCOUNTS

As an individual or non-recognized student group, you will not have access to funds through ASA, instead you will need to coordinate purchase orders and/or check requests through the UPAC Staff Assistant. Purchase order/check requests should be submitted as soon as possible but no less than ten (10) business days in advance of the date that they are needed.

After expenses have been incurred, a request for reimbursement must be submitted in writing to UPAC. If a department is requesting reimbursement, the letter must be submitted on department letterhead stating the departmental point of contact information including name, telephone and mailing address and a budget number if possible. A list of incurred expenses plus a copy of the respective receipts must be attached to the letter. A check will be issued, made payable to The Pennsylvania State University and mailed to the department, up to the UPAC allocated amount unless the item(s) expensed is a lower value.

For independent requestors or non-recognized students groups requesting reimbursement, a written request should be submitted to UPAC with the original copies of the respective receipts attached documenting the items being requested for reimbursement. Provide contact information including name, telephone and mailing address. A check will be issued to the requestor or the individual incurring the expense(s) up to the UPAC allocated amount, unless the item(s) expensed is a lower value.

6. APPEALING COMMITTEE DECISIONS

The information in the section is an excerpt from the SAF handbook, Section VI. The official SAF handbook is the governing document and is available from student affairs at the following web page: <http://studentaffairs.psu.edu/hub/activityfeeboard/>.

Appeals are not heard solely on the basis of disagreement with the decision of the allocation committee. The Student Activity Fee Board has established the following criteria for appeals.

6.1. GROUNDS OF AN APPEAL

Grounds for an appeal are honored when one of the following is found to have occurred:

- Procedures were not followed.
- Written policies were deviated from.
- Facts were missing based on the policies in place at the time of the initial proposal.

Updated policies can be found in the UPAC office or on the web at <http://www.upac.psu.edu>.

6.2. APPEAL PROCEDURE

In order to appeal, a SAF Local Appeal form must be submitted to UPAC providing the rationale as to which of the above mentioned grounds have been violated. The form may be found in the Student Activity Fee Handbook (Appendix C) and must be submitted to the UPAC office within five (5) academic days from the date of notification of the outcome of the request. UPAC must respond to the appeal within five (5) academic days from the receipt of the appeal.

6.3. REVIEW OF GROUNDS

When an appeal is submitted, the advisors, and the Sub-committee Chairs of UPAC decide if the appeal meets the previously stated grounds. The Chair only votes in the case of a tie.

UPAC will notify the results of the appeal to the organization using the Local Appeals Board Outcome Report Form within five (5) academic days from the receipt of the appeal. The form may be found in the Student Activity Fee Handbook (Appendix D)

If it is determined that the appeal has grounds, the appeal will be sent to the UPAC Appeals Board.

If it is determined that the appeal does not meet grounds, the original decision goes unchanged and the group or individual is notified that their appeal was denied and that they have the right to further appeal to the Student Activity Fee Board.

6.4. REVIEW OF APPEAL

The Appeals Board will consist of at least five (5) committee members who did not review the original request. The committee members will be chosen by the Overall Chair in consultation with at least two other Sub-committee Chairs of UPAC.

While reconsidering the proposal the UPAC Appeals Board may choose:

- To stay with the original decision made by the allocation committee
- To award more than the original allocation

6.5. APPEAL TO SAF BOARD

If the requestor chooses to further appeal to the SAF Board, the SAF Board Second Appeal Form must be completed and submitted stating the grounds for the second appeal. The form may be found in the Student Activity Fee Handbook (Appendix C).

The Chair of the SAF Board will then appoint three (3) members of the Board to review the proposal and make a new decision as to whether or not to send the appeal back to the allocation committee to be reconsidered.

The three (3) Board members appointed by the Chair cannot have been a part of either the original allocation process or the first appeal process. The appointed board members reviewing the appeal will complete the SAF Board Second Appeal Outcome Report Form to document this review. The form may be found in the Student Activity Fee Handbook (Appendix D).

If the appointed Board members find that the allocation committee's decision and the first appeal decision were appropriate, a letter will go to the club/organization/group or individual stating that the decision stands as is and this will be the end of the appeals process.

If the appointed Board members find the proposal warrants reconsideration it will be sent back to the original allocation committee recommending reconsideration.

While reconsidering the proposal the allocation committee may then choose:

- To stay with the original decision made by the allocation committee
- To award more than the original allocation.

This will be a final decision.

The requestor will be notified of the outcome of their final appeal within five (5) academic days of the date of submission of the appeal.

APPENDIX A – PROGRAM REQUEST FORM

ALL Program Request Forms MUST be signed out in person by a requestor from the UPAC office. A SAMPLE of the Program Request Form is available via the UPAC website.

APPENDIX B – TRAVEL REQUEST FORM

ALL Travel Request Forms MUST be signed out in person by a requestor from the UPAC office. A SAMPLE of the Travel Request Form is available via the UPAC website.

APPENDIX C – EQUIPMENT REQUEST FORM

ALL Equipment Request Forms MUST be signed out in person by a requestor from the UPAC office. A SAMPLE of the Equipment Request Form is available via the UPAC website.

APPENDIX D – MEDIA REQUEST FORM

ALL Media Request Forms MUST be signed out in person by a requestor from the UPAC office. A SAMPLE of the Media Request Form is available via the UPAC website.

APPENDIX E – OPERATIONAL REQUEST FORM

ALL Operational Request Forms MUST be signed out in person by a requestor from the UPAC office. A SAMPLE of the Operational Request Form is available via the UPAC website.

APPENDIX F – SAMPLE ALLOCATION LETTER

A sample of the allocation letter all general allocation requestors receive.



UPAC TRAVEL ALLOCATION

August 4, 2011

Organization: XYZ Club
Organization Contact: Mary A. Smith
E-Mail: mas123@psu.edu
UPAC Contact: John Jones

ASA: 123
Phone: 814-555-1212
Location: Pittsburgh, PA
Event Date: October 20-27, 2011

UPAC has allocated the following breakdown of \$2,931.00 towards expenses for the Pittsburgh, PA student conference. Please see comment section below for specific information regarding your allocation.

Description	Amt. Req.	Alloc. Amt
70010 Transportation	\$1,108.00	\$ 831.00
75% airfare \$750.00 (6 students \$125.00/student)		
75% shuttle \$ 81.00 (6 students \$13.50/student)		
70020 Lodging	\$1,500.00	\$1,500.00
2 rooms X 6 nights		
70030 Registration	\$ 600.00	\$ 600.00
6 students X \$100.00		
# student 6		
TOTAL ALLOCATION:	\$3,208.00	\$2,931.00


Comments:


1. Funds **will not** be released until documentation showing confirmed transportation arrangements and a completed University Travel Registration form is submitted to 229 HUB Robeson Center. Once this information is received the UPAC allocation letter will be released to the ASA office within two business days.
2. Complete the attached Student Travel Registration form. Attach all confirmed transportation documentation to the form.
3. If you do not submit this information prior to the travel day you will be ineligible for reimbursement from your restricted and unrestricted ASA Accounts for the travel experience.
4. Notify UPAC of any changes in the roster. If the number should decrease the allocation will be adjusted to reflect the correct information. This information must be submitted no less than 3 days prior to the date of departure.
5. If traveling by air, you have six (6) days from the date of notification to book your airfare. In the event that airfare increases during those six (6) days, you may submit the increased airfare and UPAC may consider funding the increase. If you book your airfare after the six days all increase in airfare is the responsibility of the student(s) and/or student organization.
6. Students must submit boarding passes to the UPAC office within 5 academic days of the return of your trip. Failure to do so could result in the being treated as an unused ticket and could result in the reimbursement of funds to UPAC.
7. If a student should cancel or choose not to attend, therefore wasting an airfare, the student organization account will be charged for the amount of the unused ticket.

For questions regarding your allocation please contact the UPAC office at 863-8951 or 229 HUB
For questions regarding accessing your funds please contact the ASA office at 865-1947 or 240 HUB

APPENDIX G – *WHAT'S GOING ON* PAGE SUBMISSION FORM


ALL *What's Going On Page* Submission Forms MUST be picked up in person from the UPAC office. A SAMPLE of the *What's Going On Page* submission form is shown below.





WHAT'S GOING ON

Submission Form



SUBMIT TO UPAC OFFICE - 229 HUB-ROBESON

ORGANIZATION NAME: _____
PLEASE SPELL OUT THE ORGANIZATION NAME – DO NOT ABBREVIATE OR USE GREEK LETTERS THANKS!

CONTACT PERSON: _____
NOT PUBLISHED – ONLY NEEDED IN CASE OF QUESTIONS.

PHONE NUMBER: _____ **E-MAIL:** _____

EVENT NAME: _____

DATE OF EVENT: _____

STARTING TIME OF EVENT: _____ **LOCATION:** _____

BRIEF DESCRIPTION OF EVENT _____

.....

**NO MEETINGS OR EVENTS AFTER 8:00 AM THE SATURDAY
AFTER THE LAST DAY OF CLASSES**

DEADLINE INFORMATION: WHAT'S GOING ON PAGES ARE PRINTED IN THE MONDAY AND FRIDAY EDITIONS OF THE DAILY COLLEGIAN. ALL INFORMATION MUST BE SUBMITTED TO THE UPAC OFFICE BY 4:30 PM EACH MONDAY – NO LESS THAN ONE WEEK BEFORE YOU WANT THE INFORMATION PUBLISHED.

PLEASE SUBMIT THE REQUEST AS SOON AS POSSIBLE TO AVOID DELAYS AND POSSIBLY MISSING THE DEADLINES. SPACE IS AVAILABLE ON A FIRST COME FIRST SERVE BASIS. RETURN ALL REQUESTS DIRECTLY TO THE UPAC OFFICE LOCATED IN 229 HUB-ROBESON. ALL WHAT'S GOING ON ADS ARE FREE TO PSU STUDENTS AND STUDENT ORGANIZATIONS. DO NOT SUBMIT TO THE COLLEGIAN!

FUNDED BY THE UNIVERSITY PARK ALLOCATION COMMITTEE

Revised 8/2012

ALL Weekly Meeting List Submission Forms MUST be picked up in person from the UPAC office. A SAMPLE of the Weekly Meeting submission form is shown below.



Telephone: _____ E-Mail: _____

[illegible]

Funded by UPAC! Your Student Activity Fee!

UPAC
Your Student Activity Fee  **At Work**

APPENDIX I – EXCEPTION TO 10% RULE FORM

ALL Exception to 10% Rule Form MUST be signed out in person by a requestor from the UPAC office. A SAMPLE of the Exception to 10% Rule Form is shown below.

10% Rule Exception Request Form

By submitting this request for an exception to the 10% Rule, the requestor hereby certifies that all information submitted regarding this exception request is authentic, complete, and correct to the best of his or her knowledge. If any information regarding this exception changes prior to the program date, the requestor will inform UPAC immediately and provide UPAC with updated documentation. The requestor understands and agrees that any inaccurate, misleading, or omitted information will be cause for withdrawal of UPAC funds, either partially or in full. If any inaccurate, misleading, or omitted information is discovered at a date following the completion of the program, any or all UPAC funding requests for the remainder of the academic year and the following academic year may be prohibited at the discretion of the UPAC Overall Chair. The requestor also acknowledges that, if granted an exception to the 10% Rule, the program receiving the exception will be subject to an audit. Please sign and date below.

If Requesting through an Organization

Organization

President's Printed Name

President's Signature

Date

Treasurer's Printed Name

Treasurer's Signature

Date

OR

If Requesting as an Individual Requestor

Requestor's Printed Name

Requestor's Signature

Date