University Park Allocation Committee

UPAC Handbook

Revised March 3, 2009

University Park Allocation Committee – Your Student Activity Fee At Work
Established 1996 – The Pennsylvania State University
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I. MISSION STATEMENT

The University Park Allocation Committee (UPAC) is dedicated to allocating a portion of the Student Activity Fee income. In order to meet its mission, UPAC will endeavor to:

A. Consider funding requests from individuals that are University-affiliated (students, faculty, and staff), and all recognized and non-recognized student organizations. UPAC funding must enhance the out-of-class experience for full-time and part-time students paying the Student Activity Fee.

B. Allocate Student Activity Fee money to causes that enhance student life and the out-of-class experience or improve the educational climate at University Park.

C. Allocate all funds among the following categories:
   i. Programs, Activities, and Initiatives
   ii. Travel
   iii. Media Production & Equipment
   iv. Organizational Operational Expenses

II. GENERAL POLICIES OF THE STUDENT ACTIVITY FEE BOARD

The following has been established by the Student Activity Fee Board: August 2007

LIMITATIONS ON STUDENT ACTIVITY FEE FUND USE

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.
2. The Student Activity Fee should not be used to replace what is currently being funded by University general funds used to permanently support programs/services equipment/activities; however, on a case-by-case basis and with the recommendation and concurrence of the allocation committee of that campus an exception can be made. Campuses should have flexibility, but must be faithful to the principle of not using Student Activity Fee income to support what is currently being funded by general funds. The Student Activity Fee can be used no less than three (3) fiscal years after University general funds no longer support these initiatives.
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 student activity fee sponsored event. With the approval from the sponsoring organization a group may sell a commodity or fund raise at a student activity fee sponsored event.
6. Requestors must use student activity fee funding in the manner in which they were allocated.
7. Activities sponsored by the student activity fee must be open to all University students at the location that is funding the event.
8. The student activity fee 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 exception being 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 Student Activity Fee 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. The registered student organization wishing to fund raise at an event supported by the Student Activities Fee 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 Allocation Committee and follow the procedures outlined in Policies and Rules for Student Organization.

ITEMS THAT WILL NOT BE FUNDED

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.
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 Student Activity Fee.
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.

III. UPAC TERMS

UPAC defines the following terms as:

Academic Day: any day that 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 day following spring commencement the following year. (The order of semesters in an academic year is: Summer Session I, Summer Session II, Fall, Spring).

Addendum: request for an addition to an already approved UPAC budget to cover unforeseen expenses not in the original budget.

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 fess (riders not included). Honoraria does not include local, non-performing DJ's.

General University Reference Utility (GURU): Penn State's suggested maximum lodging allowance specific to location. Refer to http://abs.psu.edu/TravelRates/

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.

Requestors:

- Recognized Student Organizations:
  - recognized through the Student Affairs – Center for Student Engagement.
- 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 – Center for Student Engagement.
- Independent:
  - any full-or part-time registered University Park student.
- Faculty/staff

Tabling: portions of a request in its entirety may be tabled for a number of reasons including, but not limited to, the request being incomplete, lack of pertinent information, discrepancies in calculations, ASA concerns, or concerns regarding program/publicity content. 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.

Total Program Cost: the amount being requested; the documented value of any community and in-kind donations, honoraria negotiations, and group contributions; and the total expenses for execution of the program.

IV. REQUESTING PROCEDURES

A. UPAC STUDENT CONTACT

When a requestor signs out a form to request programming, equipment, media, operational or travel funding from the UPAC office, a UPAC member from the Student Contact Team (SCT) is assigned to work with the requestor. The contact person provides assistance with any concerns or questions about the media production, equipment purchase, or execution of the program or trip. It is imperative that the requestor and contact person meet to discuss the request. The contact person will represent the requestor to one of the two allocation teams. The requesting individual or group is encouraged to be present at the meeting to answer questions.

The SCT member is expected to contact the requestor within 3 academic days of signing out a request. It is also the responsibility of the requestor to be in touch with the SCT person. In the event that your organization has not been contacted, please call the UPAC office for assistance at 814-863-8951 or upac@psu.edu.

B. THE 20% RULE

Requestors are responsible for a MINIMUM of twenty percent of their total program cost. Any requests for exceptions must be included in the original request.

C. DEADLINES

1. 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. Requests must meet with their assigned UPAC student contact to assure completion prior to deadlines to assure completion.

2. PROGRAM REQUESTS

All requests must be complete to be accepted for review. Program requests must include appropriate materials including biography, reviews, room and banner space confirmation and bids for all items to be purchased or rented, as stated on the *Request for Program Funding* form.

a. Four (4) Academic Week Deadline (20 Academic Days Prior to the Program Date)

This deadline applies to any programming request that:

- does not require contracting.
- requires a contract with a local vendor for less than $3000.
- requires a contract with a university approved vendor or caterer (Please refer to http://guru.psu.edu/Risk for the approved listing).

b. Eight (8) Academic Week Deadline (40 Academic Days Prior to the Program Date)

This deadline applies to any program request that requires:

- contracting for honoraria, services, or venue.
- does not fall within the criteria for a 4 week deadline, as listed above.
- the use of Eishenhower Auditorium, Schwab Auditorium, Rec Hall, White Building, or IM Building.

3. TRAVEL REQUESTS

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, and an estimate of the round trip mileage to the location, as stated on the *Request for Travel Funding* form.

a. Four (4) Academic Week Deadline (20 Academic Days Prior to the Departure Date)

This deadline applies to any travel request that:

- requires the use of a fleet vehicle or personal vehicle (an STA bid is not necessary).

b. Eight (8) Academic Week Deadline (40 Academic Days Prior to the Departure Date)

This deadline applies to any travel request that:

- requires any mode of transportation other than fleet or personal vehicles (an STA bid is necessary).

D. REPERCUSSIONS OF VIOLATING UPAC POLICY

UPAC reserves the right to audit any UPAC-funded event and to impose penalties for non-compliance with UPAC policies as stated in the *UPAC Handbook*. 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.

E. MISCELLANEOUS EXPENSES

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

F. ADDENDA

When additional or unforeseen expenses arise, a group may submit an addendum. Groups must address a letter to UPAC that explains the costs and the rationale for the additional request.

UPAC only considers additional allocations for expenses that are necessary for the success of the program/travel and have increased since the allocation was made and was not originally submitted/included or considered during UPAC's first review of the budget.

UPAC requires that notification of any changes to the event be submitted in writing at least 2 academic weeks (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.

V. PROGRAM FUNDING REQUESTS

A. GENERAL 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.

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.

B. HONORARIA
UPAC discourages funding for honoraria recipients who have performed at University Park campus within the last 12 months.

1. An organization requesting honoraria funding is eligible to receive up to four honoraria per academic year. No student group may be funded for more than $20,000 for honoraria in an academic year.
2. An organization may be funded a maximum of one honorarium up to $10,000.00 and up to three additional honoraria not to exceed $10,000.00 in total.
3. One-day events are eligible for a maximum of 4 honoraria recipients not to exceed $20,000.00, regardless of the number of co-sponsoring organizations.

UPAC will not consider funding for honoraria recipients' or stagehands' meals.

Lodging expenses for honoraria recipients staying in the State College area are capped at $85/room per night.

C. INTERNATIONAL HONORARIA RECIPIENTS
Requestors must submit a copy of all international honoraria recipients' visas with the original request.

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

Requestors bringing in international honoraria recipients must work with a University Department willing to cover the expenses of the honoraria recipient and then subsequently be reimbursed by UPAC. A letter from the department stating that they 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 ASA. UPAC will then reimburse the University Department.

D. FACILITY AND EQUIPMENT RENTAL
A confirmation of venue reservation must be attached to the request.

If renting equipment through the Office of Physical Plant (OPP), a work order must be obtained through the Events and Facilities Management in 125 HUB at least three weeks in advance of the program date. This would include such things as: stages, risers, tables, chairs, etc.

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

E. CLOTHING / COSTUMES / APPAREL
UPAC can consider requests for costumes (purchase, rental, cleaning and storage).

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.

F. 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, then the food portion must be optional.

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

UPAC will consider items that meet 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 items that could otherwise be considered awards or gifts.

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

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

"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 on."

H. 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 (http://www.clubs.psu.edu/upac).

UPAC will not consider funding advertising in *The Daily Collegian* (Collegian Inches). 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*. Forms are available in the UPAC office.

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.

I. 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.

Within 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). It must also include documentation from ASA indicating the costs of the event. If reconciliation is not submitted within 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.

J. DATES OF EVENTS

UPAC considers funding of programs which occur during times when students are required by the University to be at University Park before classes begin for a semester or session. Allocations are 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 during the last day of classes beginning 5 pm, through the Monday following final exams. This does not include participation in events scheduled by conference, regional, or national affiliates."

VI. TRAVEL FUNDING REQUESTS

A. GENERAL GUIDELINES

UPAC defines travel as 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 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.

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 Limits travel to the 48 contiguous states and the District of Columbia.

B. TRAVEL EXPERIENCE CATEGORIES

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

1. **EDUCATIONAL Experiences**
   - Event for which 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.

2. **COMPETITIVE Experiences**
   - Event for which the primary purpose is for students to apply knowledge or skills in a competitive manner in pursuit of recognition.

3. **PERFORMANCE Experiences**
   - Event for which the primary purpose is for students to demonstrate skills or abilities for an audience in an informative or entertaining manner.

4. **SERVICE Experiences**
   - Event for which the primary purpose is for students to volunteer assistance where the primary beneficiary is a community in need.

C. TRAVEL PROCEDURES AND REGULATIONS

1. ACADEMIC YEAR FUNDING CAPS

UPAC will only fund up to a total of $7,500.00 towards travel requests per organization (recognized or non-recognized), per academic year.

UPAC will only 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 three (3) 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.

2. INFORMATION TO BE SUBMITTED WITH THE REQUEST FORM

- UPAC requests that an organization provide as much detail as possible regarding the need for the travel allocation.
- 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.
- One bid for air, bus, and/or rental car from STA Travel.
- A published description of the itinerary or comparable itinerary from last year

- A complete breakdown of the costs
- An estimate of the round trip mileage to the location.
- A roster of all students intending on participating in the experience.

3. TRANSPORTATION REGULATIONS

- All student travel (unless personal vehicles or vehicles from Fleet Services are used) must be booked through STA Travel Agency located on the first floor of the HUB-Robeson Center. The phone number for STA is 814-867-8960.
- UPAC will consider funding up to 75% of the total transportation cost of an experience.
- Bids for airfare, rental cars and/or busses must be obtained from the STA Travel Agency located on the first floor of the HUB-Robeson Center. Funding will not be provided for both car rental and mileage.
- UPAC will consider funding at the current fleet service mileage reimbursement when traveling by means of a private vehicle.
- UPAC will consider additional expenses such as taxicab or shuttle fares and parking fees.

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.

5. LODGING EXPENSES

UPAC will fund lodging in accordance with Penn State G.U.R.U. recommended lodging allowance. (Recommended lodging allowances can be found at http://abs.psu.edu/TravelRates).

UPAC will consider exceeding the recommended allowance if a group submits a bid from the preferred hotel and from two comparable alternative hotels in the area, as well as any additional justification for why the higher cost is needed.

6. REGISTRATION EXPENSES

Registration fees are capped at $100.00/person. However, if a registration fee, which exceeds the $100.00 cap includes the cost of lodging and/or transportation, 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/person cap.

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 are the responsibility of the group/participants.

8. SPRING BREAK TRAVEL

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

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 decrease in students does not mean that the organization is entitled to the original allocation. A failure to do so may result in the student organization reimbursing UPAC.

10. REGULATIONS REGARDING AIRFARE & AIR TRAVEL

a. SUBMISSION OF ROSTER

All students who request airfare funding, must commit to the trip by submitting their name as part of a roster with the request.

b. SUBMISSION OF CANCELLED BOARDING PASSES

All students traveling by air are required to submit their cancelled boarding pass to UPAC at their scheduled post-experience Evaluation with the Student Relations Team (SRT). If the organization is not scheduled for or does not participate in an evaluation, the boarding passes must be submitted to the UPAC Office within 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.

c. 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 request and receive funding 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.

d. AIR FARE BOOKING

Requestors should book their tickets within 30 calendar days from receiving their allocation letter from UPAC. In the event that the price increases, please bring the new airfare to the UPAC office so that the Leadership Team may review the increase and consider funding the new price. After 30 calendar days, the organization will resume full responsibility for the change in increase.

VII. MEDIA PRINT AND PRODUCTION REQUESTS

Media Expenses

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

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

If an organization is requesting assistance with media production, they must submit documentation of the costs associated with these expenses.

- A minimum of three (3) different company bids must be attached to the request for the media production.

All published materials must include the following disclaimer:

"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 included in the publication.

A list of the Board of Director (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://www.sa.psu.edu/engage/studentorgs/pdf/Policies%20Rules.pdf

VIII. EQUIPMENT FUNDING REQUESTS

Equipment Expenses

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. Funds will be released after receiving confirmation of total purchase price.

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.

If an organization is requesting assistance with the cost of equipment, they must submit documentation of the costs associated with these expenses.

- A minimum of three (3) different company bids must be attached to the request for equipment.
- Equipment such as copiers, faxes, printers, etc. will not be considered for funding by UPAC.
- 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.

No student organization or standing allocation organization may charge for use of UPAC funded equipment.

IX. ORGANIZATIONAL OPERATIONAL EXPENSES

A. Operational Expenses

UPAC provides organizational operational funds to recognized student organizations to aid in their basic maintenance and operating expenses. Student organizations may only submit one operational request per academic year.

Valid expenditures include:

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

When a group exhausts these funds, it is the group's responsibility to cover any remaining organizational expenses for the academic year.

Organizational Operational funds are distributed to recognized student organizations as stated below:

Type A: The following governing body organizations: GSA, Greek Councils, UPUA & ARHS, wishing to receive operational funds from UPAC must provide a complete line-item breakdown of their request. Any organization requesting significantly more than the previous year must provide rationale to support this increase.

Type B: All other recognized student organizations. Type B requestors are currently eligible to receive a $50.00 allocation.

B. STAFFING EXPENSES

a. Only those organizations classified as Type A organizations may request staff assistant wages. These funds must be requested in your annual line item operational funds request. UPAC provides assistance at the rate of minimum wage plus $.25 per hour. Any raises, taxes, and benefits are the responsibility of the student organization.

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

i. 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

ii. The fee may not be used for "grants-in-Aid, scholarships, salaries, or stipends."

C. TELEPHONE EXPENSES

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. Groups may not request additional or private phone lines or fax lines from UPAC.

D. OTHER OPERATIONAL EXPENSES

UPAC does not consider funding expenses that are for the daily operations of an organization. Examples of these expenses include, but are not limited to, office supplies, copies, staffing, etc.

X. ACCESSING FUNDS ALLOCATED BY UPAC

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. (See below for requestors without ASA accounts.)

NOTE: UPAC encourages student requestors to present their copy of the allocation letter (to be obtained in the UPAC office after 3:00 pm on the Friday following the Tuesday night review) to ASA in order to access the funds. Bring this letter to ASA each time UPAC funds are accessed.

A. ASA CHECK REQUESTS

An ASA Check Request will identify the person to be paid by the student organization and the amount. Original receipts, order forms, registration information and/or contracts, must be attached to the check request. If the proper documentation is not present, the funds cannot be released and no check will be issued.

Once a check request is submitted to ASA, it takes 2 days to process, i.e. if you need a check by Friday all completed paperwork must be submitted to ASA by Wednesday.

B. ASA PURCHASE ORDERS

An ASA Purchase Order is the only form of credit that student organizations can use for purchases of goods and services on or off campus.

In order to get a purchase order from the ASA Office; the organization must provide the following information:

1. Name of organization
2. Which account will be used (unrestricted, restricted, special)
3. Item(s) for purchase
4. Vendor (place of purchase)
5. Estimated or quoted amount of purchase
6. Object Codes (found on the allocation letter)
7. Special delivery instructions (if applicable)

Invoices with purchase orders will be paid upon receipt by ASA.

If purchase orders are obtained and used for something other than what was allocated, funds for the inappropriate items will be expensed from the organizations unrestricted account.

NOTE: Consult the Treasurer's Manual provided by ASA for further policies and procedures concerning disbursement of funds.

C. STUDENTS WITHOUT ASA ACCOUNTS, INDIVIDUALS, NON-RECOGNIZED STUDENT GROUPS

UPAC disperses allocations to the recognized student groups through Associated Student Activities (ASA). 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 Office Staff Assistant. Theses requests must be submitted at least three business days in advance of the date that they are needed.

XI. APPEALING A UPAC DECISION

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:

A. GROUNDS OF AN APPEAL

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

1) **Procedures were not followed,**
2) **Written policies were deviated from**
3) **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.clubs.psu.edu/upac.

B. APPEAL PROCEDURE

In order to appeal, a letter must be submitted to UPAC providing the rationale as to which of the above mentioned grounds have been violated.

The timeline for filing an appeal to UPAC is within 5 academic days from the date of notification. UPAC must respond to the appeal within 5 academic days from the receipt of the appeal. Appeals to the Fee Board must be received within 5 academic days from the date of notification from UPAC's appeal decision. The Fee Board must review the appeal and notify the individual/group within 3 academic days after the appeal committee is selected (Fee Board Policy).

A. REVIEW OF GROUNDS

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

If at least one of the advisors is not available, another designated staff member of his or her committee may fill the seat.

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.

B. 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 (2) other 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

E. APPEAL TO STUDENT ACTIVITY FEE BOARD

In order to appeal to the Student Activity Fee Board, a letter must be submitted to the Chair of the Student Activity Fee Board addressing the reasons the decisions of the allocation committee and the first appeal were unfair and how there are grounds for appeal.

The Chair of the Student Activity Fee Board will then appoint 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 Board members appointed by the Chair cannot have been a part of either the original allocation process or the first appeal process.

If the appointed Board members find that the allocation committee's decision and the first appeal decision was 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 that 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 first appeal within ten (10) days of the date of submission of the appeal.

XII. INTERNAL UPAC INFORMATION

A. GENERAL POLICIES

All UPAC members are expected to be present for the entire meeting.

UPAC members are required to vote **for** or **against** proposals, policies, etc. Members are not allowed to abstain.

In order to cast a vote, a member must have been in attendance for the entire presentation.

UPAC members may not be present during any discussion of, or vote for, budgets in which they have a vested interest. It is the member's responsibility to recuse themself.

All decisions are to be considered as pending until the UPAC Chair signs allocation letters, verifying legitimacy and compliance with University and Fee Board rules and regulations.

B. COMMITTEE MEMBERSHIP

Membership on the UPAC is open to any full-time or part-time, officially registered student at the Pennsylvania State University – University Park Campus.

The UPAC will be comprised of thirty-five (35) students. Twenty-five (25) members will be appointed. Ten (10) members will be elected at-large. The numbers of undergraduate and graduate students appointed and elected will be based on the average percentage of enrollment of the two over the past 3 years at University Park campus.

The committee members will serve one year and may be re-appointed or re-elected consistent with the established process outlined later in this document. Members are responsible to serve office hours as assigned and to attend weekly and monthly meetings. Excused absences are given for exams, academic review sessions, and emergencies only. Written requests for such instances should be given to the Chair, Sub-committee Chair, and Staff Assistant, preferably in advance, but no later than two (2) days after. Membership will be terminated after two unexcused absences per semester.

C. APPOINTMENT PROCESS

Twenty-five students will be appointed by the UPUA President, The GSA President, the current UPAC chair and the Vice-President for Student Affairs or designee. The UPUA President will be present for only the undergraduate applicants, and the GSA President will be present for only the graduate applicants. This will be done based on applications and interviews. Applications for appointed positions must be returned by the second Monday of February. All current members considering re-appointment must also apply. Interviews will be held beginning the third Monday of February. Applicants will be rank-ordered and the appropriate percentage of undergraduates and graduates will be selected. Successful applicants will be assigned to one of the four sub-committees. Notice will be given so that those no appointed may consider running in the UPAC election process.

D. ELECTION PROCESS

Ten students will be elected at large to serve on the committee. The appropriate number of undergraduates to graduates elected into these positions will be based on the current enrollment figures. The filling of the undergraduate elected positions will follow the election protocol of the Undergraduate Student Government and the graduate elected positions will follow the protocol of the Graduate Student Association.

Unexpected vacant appointed positions will be filled by the next highest ranked applicant from the most recent interview sessions. Unexpected vacant elected positions will be filled by the candidate with the next highest amount of votes. If there were no other candidates, the position may be filled with a student who served on the temporary summer committee. If none of the above possibilities exist, a campus-wide advertisement for applicants will be necessary with a second round of interviews being conducted using the appointment process. All graduate student positions will be chosen through GSA.

E. SUMMER COMMITTEE
Once committee members are appointed/elected to UPAC for the academic year, they need to inform the Chair as to whether or not they will be available during the summer months to participate in an ad-hoc committee. The summer committee will consist of a minimum of seven (7) students enrolled in at least one course that semester. If there are not seven UPAC members available for this committee, special advertising will go out to recruit members. There are no sub-committees in the summer. Quorum for summer meetings is five (5) committee members.

If the Chair is not available in the summer, an interim chair will be appointed by the Chair and the Advisors.

The summer committee will consider all incoming budgets for the summer as well as any budgets for the fall semester that fall within the 40 academic day deadline.

An abbreviated version of the Appeals process will be necessary during the summer months. The Appeals Board will consist of an advisor and three (3) members who have not heard the original budget proposal. Replacements due to absence or vested interest will be handled as they are the Appeals section above.

F. MEETINGS
UPAC will conduct weekly meetings. The meetings will be held each Tuesday evening during the fall and spring semesters. All members are expected to be at the meetings. Additional meetings may be scheduled as circumstances warrant by either UPAC Chair or the Sub-Committee chairs.

The committee will conduct full committee meetings as necessary. All Committee members are expected to be at the full committee meetings.

Each committee will meet during Tuesday evening at a set time. Agenda's will be set for the two allocating teams. All decisions regarding allocations are made during the review session, after a presentation by the requester.

G. MEETING MINUTES
The Allocation Teams will have a designated person to keep minutes of the meetings. Full Committee/Policy meetings will also have a designated person to take the minutes.

All meeting minutes will be saved to a disk as well as printed out the evening of the meeting. Each committee will have a designated binder to put the minutes. The binders are available in the UPAC office. The UPAC Chair is available to review the minutes. To review the minutes please make an appointment with the UPAC Chair.

H. TRAINING
All elected/appointed members including the chairs will be expected to complete a two (2) credit training course which will provide developmental and diversity training; programming planning and delivery; and budgetary concerns through discussions and case studies. These classes are held on each Tuesday during the Fall Semester from 6:00 PM -7:00 PM. All new elected/appointed members are expected to attend and submit all required class assignments.

I. SUB-COMMITTEES
UPAC shall consist of four standing sub-committees:

1. Student Relations Team (SRT)
The Student Relations Team consists of three members. The SRT Sub-Committee Chair guides this team in the following areas:

- Encourage groups to become involved and apply for student activity fee funding. They provide ideas and research successful events that were held in the past.
- Present UPAC information at student organization meetings and hold informational workshops throughout the semester.
- Through individual contact with student organizations, search for new ways to publicize UPAC sponsored programs, and address complaints or problems from requestors.
- Work with advisors and administrators to address issues/guidelines/policies. The SRT will generate and research policy recommendations.

- Review policy proposals, correct factual errors in the background, and suggest additional changes. Any changes that the authors decline will be written up as an addendum to the policy on a separate sheet. SRT will assign a contact person for each policy. If the policy is found to violate fee board policy, the author(s) will be notified in writing. Students must submit policies 12 academic days in advance of policy meetings.

2. Student Contact Team (SCT)
The Student Contact Team consists of five members. It is the primary responsibility of this committee to assist requestors with planning UPAC funded travel and programs. They will assist requestors both before and after an allocation to ensure that the requestors understand the UPAC allocation process.

3. Allocation Teams (Hetzel and Nittany: HAT and NAT)
There shall be two allocation teams consisting of eleven members each. These teams review and make allocation decisions on both programming and operational budgets presented by the Student Contact Team on behalf of the students and/or student organizations. Quorum for allocation teams is seven (7) members.

4. Standing Allocation Team
The Standing Allocation Team shall be made up of UPAC members serving as voting members from HAT or NAT. This team will serve as contacts for the standing allocations in the spring semester of each year. They will meet and keep in contact with the requestors throughout the year to assist in the preparation of the organizations request. The team will also ensure throughout the year that policies and stipulations are followed according to UPAC policy and committee's funding decision.

A Standing Allocation Request may not be decreased by more than 10% of the previous year's allocation, unless approved by a 2/3 majority of the voting members present at the time of the vote. Items that were stipulated as a one time contribution will not be considered in the 10%.

A Standing Allocation is one where the organization serves some type of campus-wide programming need that contributes to the well-rounded experience of all University Park students. Student organizations are not eligible to receive standing allocation funds.

These policies apply to the current UPAC-recognized standing allocation organizations. Standing allocation organizations are eligible to receive UPAC funding for their campus-wide programming expenses.

Standing allocation requestors must submit a projected budget for their planned expenses. Exact bids will not be required. Requestors must also submit details relating to their previous year's Student Activity Fee expenditures.

UPAC programming and equipment caps are not applicable to SAT organizations.

If the Standing allocation organization is requesting travel funds specifically for their student leadership, they will be held to the $7500 UPAC travel cap, but not to the transportation expenses, registration caps, or three (3) travel experience limit.

For travel provided through a standing allocation organization to students at the university at large, individual students attending must be required to cover at least 25% of their travel experience expenses. Student Activity Fee funds may only be used for students.

SAT organizations are not eligible to submit addenda to UPAC.

J. ADVISORS
UPAC shall have a minimum of two (2) advisors appointed by Student Affairs. Each of the allocating committees will have an advisor. Together the advisors will monitor the overall process of UPAC, the appointment and election processes and coordinate the reporting of allocations appropriately. The advisors will serve as instructors for the 2 credit training course.

Graduate students may be appointed by Student Affairs to serve as advisors for the sub-committees. They will attend all sub-committee meetings, and inform a UPAC advisor of progress.

K. VOTING PROCEDURES

Only appointed/elected members may vote on budget requests. The UPAC Chair or Sub-committee Chairs vote only in the case of a tie.

Two-thirds of the sub-committee must be present in order to vote on a budget. Majority is fifty percent plus one (51%) of membership present.

When voting on budgets, committee members make recommendations and vote by a showing of hands. Individual votes will not be recorded in the minutes of the meeting but rather the total for and against. Committee members may not to abstain from voting. However, if a member has a conflict of interest with a particular request, including if member holds an executive or other prominent role in a specific organization, they are encouraged to recuse themself prior to the review of the request.

L. LEADERSHIP TEAM SELECTION PROCEDURES

Overall Chair

The UPAC Chair process will begin after the appointment process is finished. To run for the Overall Chair position the candidate must have served at least one year on the committee and be re-appointed. The candidate also may not hold an officer position in any other student organization. The outgoing Chair may choose to run for a second term if re-appointed to the committee.

The UPAC Chair selection process shall consist of two parts, an interview and an election.

The interview panel consists of the two (2) UPAC Advisors, the outgoing Chair, and two (2) outgoing UPAC members, selected by the committee.

The interview vote shall count for 25% of the total vote and may be divided among the candidates by the interview panel.

The election shall count for 75% of the total vote and is divided in accordance with the number of votes received.

A candidate must receive a plurality of the total votes in order to win. A candidate does not need a majority (50% + 1) of the total vote to win.

Sub-committee Chairs

Sub-committee Chair elections will be held after the UPAC elections. Applications will be available in the UPAC office no later than the Monday following the UPAC Elections. Submission deadlines will be noted on the application. Any member, new or returning, may run for a Sub-committee Chair position. There will four (4) sub-committee chair positions available. When running for a sub-committee chair position, the candidate will run to fill a Leadership Team position. Specific sub-committees will be assigned by the Chair-elect, outgoing Leadership Team, and the advisors after the election process is completed.

The UPAC Sub-committee Chair selection process shall consist of two parts, an interview and an election.

The interview panel consists of the two (2) UPAC Advisors, the outgoing chair, and the incoming chair.

The interview vote shall count for 25% of the total vote and may be divided among the candidates by the interview panel.

The election shall count for 75% of the total vote and is divided in accordance with the number of votes received.

A candidate must receive a plurality of the total votes in order to win. A candidate does not need a majority (50% + 1) of the total vote to win.

Each committee member will be asked to vote for four candidates during the Sub-committee Chair elections.

M. POLICY ADOPTION/CHANGES IN THE PROCEDURE MANUAL
The Student Relations Team (SRT) will generate and research policy recommendations.

SRT will review all policy proposals, correct factual errors in the background and suggest additional changes. Any changes that the authors decline will be written up as an addendum to the policy on a separate sheet. SRT will assign a contact person for each policy. If the policy is found to violate fee board policy, the author(s) will be notified in writing. Students must submit policies 12 academic days in advance of the policy 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 2/3 of the general committee.