

MANUAL  
FOR THE ADMINISTRATION OF STUDENT ACTIVITY FEE FUNDS  
INDIANA UNIVERSITY - PURDUE UNIVERSITY FORT WAYNE

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LEGAL ACCOUNTABILITY

By law, all fees assessed and collected by Purdue University become public funds. The Indiana General Assembly appropriates these fees to the BOARD OF TRUSTEES for the use of the University. Student Service Fees are a part of this appropriation. As a result, (1) the TRUSTEES are legally responsible for the manner in which the funds are spent, (2) the funds are subject to all laws and regulations which apply to public funds, and (3) the Treasurer of the University is accountable for all such funds which are subject to audit by the State Board of Accounts.

In order to discharge this responsibility, and to ensure the utilization of Student Service Fee Funds for the purpose for which they are assessed, the University has developed the operating policies shown as Section I of this Manual.

The remaining sections of the Manual are jointly issued by the Vice Chancellor for Student Affairs, the Vice Chancellor for Financial Affairs, and the Chancellor to implement the University's policies and to provide an operating document for Indiana University - Purdue University Fort Wayne students and staff.



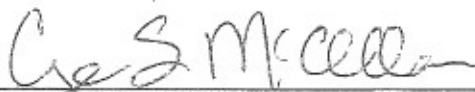
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## SECTION I: GENERAL OPERATING POLICIES

- A. General Policy: Student Activity Programs are a necessary and normal aspect of the University's educational process and as such Student Service Fee income may be used to provide financial support for University approved cultural, recreational, social and educational programs which contribute to a well-rounded student life.

Student Service Fees assessed and collected at Indiana University - Purdue University Fort Wayne shall be dedicated for such use at this campus.

- B. Guidelines for Expenditure of Funds: Funds may be expended for the following purposes:

1. Payment for talent, such as: lectures, concerts, theater, etc.
2. Printing and engraving.
3. Orchestras and bands.
4. Programs and decorations.
5. Travel and transportation.

Students may request travel funding in accordance with approved University travel regulations from Student Government. Travel funding shall only be awarded on a per-event basis, and must fall within one or more of the following categories:

- a) Student Government members attending an event consistent with the duties of Student Government or his/her position. Approved examples include, but are not limited to: National Association for Campus Activities conferences, Student Government Summits, Board of Trustees Meetings.
- b) Faculty and staff are eligible to receive travel funding if they are accompanying students or facilitating a student activity/event.
- c) Travel that is part of a Student Government-sponsored activity, open and promoted to the entire Student Body, such as Spring Break Trips and Ski Trips.
- d) Individual student and/or student organizations travel to an event at which they are clearly representing the University. Examples include, but are not limited to: students presenting a paper at a professional conference, student organizations engaged in intercollegiate competition (e.g. Debate Club competition, Society of Automotive Engineers Mini-Baja competition, etc.)

All requests will be reviewed and considered for possible funding by the appropriate Student Government officials based on the amount or level of "University representation" offered by the proposed travel and/or the degree to which the proposed activity can be considered to be in the interests of the student body; travel where the individual traveler is the only beneficiary should not be funded. Approved funding may include additional terms or requirements (e.g. shared funding, etc.) and will be considered nonrecurring in the sense that individual requests must be made on a per-event basis; there will not be an annual, general budget allocation.

6. Furniture and capital equipment.
7. Musical instruments and music supplies.
8. Books and periodicals which specifically pertain to the activity or organization objectives.
9. Promotional materials and give-aways. Give-away items must be of minimal value and should not exceed \$25 in cost per item without approval by the University Comptroller.
10. Noncash awards for those being recognized at a University-wide recognition program for outstanding performances or services to the campus.
11. Recreational equipment and supplies.
12. Advertising and publicity.
13. Custodial and physical plant expense.
14. Rental of facilities.
15. Office equipment rentals and purchases.
16. University-approved organization or institutional memberships (as opposed to personal memberships.)
17. Meals/refreshments/beverages solely under the following provisions except those that are necessary as a result of travel:
  - a) For those being recognized by the University at a University-wide recognition activity for outstanding performances or services to the campus and for those formally participating in such a program and their invited guests.
  - b) For student participants at University-wide recognition activities who are: (1) elected or appointed representatives of the student body or (2) students nominated for awards by University officials or (3) students having received awards

for academic or service accomplishments within the academic year in which the recognition activity is held.

- c) For student campus-wide events, activities and receptions.
  - d) For workshops and/or special training meetings of all campus representative groups with the prior approval of the Dean of Students. Such workshops and/or special training meetings must be conducted under the direct supervision of a professional staff member of the University or by a qualified expert in the field of such work.
  - e) For currently enrolled students, faculty and staff as part of a special event or celebration (examples include: Welcome Back Week and Student Achievement Celebration).
- 18. Payment for necessary staff to carry out student activities and/or government functions. Such staff must be approved by the Chancellor or his/her designee and must be under the supervision of an official of the University. Such positions must be clearly within the areas of activities planning, promotion, and supervised implementation. Only when such positions are clearly defined as administering to the quality of the approved program, as opposed to mere participation in a program, should payment be allowed.
  - 19. Uniforms and normal upkeep of uniforms for band, University hosts and hostesses, and recognized music groups.
  - 20. Subscriptions to University-recognized student newspaper.
  - 21. One-time start up allocation for approved and chartered student organizations which may be used during an initial period of organizational development.

C. Unallowable Expenditures: Expenditure of funds for the following purposes is expressly prohibited:

- 1. Honoraria to University staff or students for presenting programs for student activities or athletics.
- 2. Cash awards or gift certificates.
- 3. Personal subscriptions or memberships.
- 4. Donations (with the exception of income derived from a fund-raising activity approved under Section 4.01 of Regulations Regarding Canvassing, Peddling, Soliciting, and the Delivery of Merchandise on the Campuses of Purdue University as Administered at Indiana University - Purdue University Fort Wayne).
- 5. Alcoholic beverages.
- 6. Contributions or expenditures in connection with any non-campus

political campaign (including primaries) on behalf of any candidate for public office.

D. Local Authority:

1. Authority and responsibility for recommending to the President proposals for the allocation of Student Service Fee income is vested with the Chancellor.
2. The Vice Chancellor for Financial Affairs or his/her designee is responsible for: (a) establishing annual fee income estimates, (b) recommending and establishing adequate fee income reserves, and (c) controlling expenditures within funds available and within University fiscal policy and procedures, including those described above.

E. Presidential Authority: The President of the University is authorized to issue regulations and to establish procedures for the purpose of promulgating these policies.

SECTION II: PROCEDURES FOR ALLOCATING FUNDS AND PREPARING BUDGETS

A. Determination of Funds Available:

1. Income Estimates and Apportionment: Annually, the Vice Chancellor for Financial Affairs or his/her designee will establish Student Service Fee income estimates based upon official University enrollment projections for the ensuing year. The Chancellor will approve the apportionment of the Student Service Fee income to student activity programs.
2. Reserves: The Vice Chancellor for Student Affairs and the Vice Chancellor for Financial Affairs will jointly agree on the amount of the estimated income to be retained in the reserve fund and the remainder available for allocation.
3. Timetable: When the above estimates are available, the Vice Chancellor for Financial Affairs will develop a timetable for the accomplishment of the various steps and actions detailed in this section. This timetable shall provide for the finalization of the budget no later than June 1 and shall be published and given wide distribution among organization officers, advisers, and others who will participate in the various steps.

B. Preparation of Preliminary Budgets:

1. Format: The Vice Chancellor for Student Affairs will specify the format or provide the forms to be used for the development of organization and activity preliminary budgets.

2. Eligibility: Only those students who have paid the Student Service Fee and present their validated student ID are eligible to participate or have memberships in student programs and organizations which are funded from Student Service Fees except that others may attend or participate in a specific event by the payment of an admission fee or invitation by host.
3. Eligibility Review: As preliminary budget requests are received, Student Activity budgets will be reviewed by the Business Manager for Student Activities and Organizations, the Student Government Coordinator, and the Student Body Comptroller. The purpose of the review is to identify any organizations, any activities, or any specific proposed expenditures which do not conform with the policies adopted by the BOARD OF TRUSTEES. Any questionable proposed expenditures will be forwarded to the University Comptroller for an interpretation of legitimacy.

Activities and organizations eligible to receive a recurring annual allocation include but are not limited to:

- a. CASA Tutoring
  - b. Child Care Center (Per Student Government and IPFW Administration Agreement)
  - c. Communicator
  - d. Graduation Celebration
  - e. Honors Program
  - f. IPFW Stomp Band
  - g. Leadership Development Retreat/Hospitality
  - h. Mentoring Program
  - i. Student Orientation, Advising and Registration
  - j. Starting, Transferring And Returning Students
  - k. Student Activities (Per Student Government and IPFW Administration Agreement)
  - l. Student Handbook
  - m. Students With Family Dinners
  - n. Student Government
4. The Student Government shall consider the preliminary budget request from their respective organizations and activity groups deemed to be eligible. Upon approval of the Student Activity budget by the Student Government, the preliminary budgets will be forwarded to the University Comptroller's Office for review and preparation of the final budget.

C. Preparation of the Final Budget:

1. Total Annual Budget: The University Comptroller's Office will prepare the total Student Activity budget for the required signatures. These budgets will consist of two parts:

Part I will be a summary for the Student Service Fee allocated to student activities. This will be incorporated in the self-supporting enterprise budget summary.

Part II will be a detailed budget showing the breakdown by specified categories.

Both parts may be submitted to the appropriate fiscal officer at Purdue University - West Lafayette.

2. Required Signatures: The final budget, as submitted, will carry the signatures of the Chancellor, the Vice Chancellor for Financial Affairs and the Vice Chancellor for Student Affairs.

SECTION III: REGULATIONS GOVERNING THE ACCOUNTING OF FEE INCOME AND EXPENDITURES

- A. Accounting of Fee Income and Expenditures: All income and expenditures of Student Service Fees shall be accounted for on the University books of account. Annual budgets recommended through University channels and approved by the BOARD OF TRUSTEES shall be established on the books of account.
- B. Budget Adjustments: After the BOARD OF TRUSTEES has approved the various annual operating budgets, adjustments may be made as follows:
  1. The Vice Chancellor for Financial Affairs is authorized to approve interim budgetary adjustments within the total budget amounts approved by the BOARD OF TRUSTEES.
  2. The Executive Vice President and Treasurer shall approve, or when necessary recommend to the BOARD OF TRUSTEES for approval, all other budgetary changes upon recommendations by the Vice Chancellor for Financial Affairs and the Chancellor.
- C. Reserve Funds: The Vice Chancellor for Financial Affairs shall maintain a reserve fund balance as previously determined by agreement with the Vice Chancellor for Student Affairs. Such reserve funds may be used for contingencies against income estimates, supplemental requests, and capital equipment purchases relating to student activities or government.

Transfers from the reserve fund must be approved by the Vice Chancellor for Financial Affairs.

- D. Start-Up Funds:

Withdrawal of Start-Up Funds: A student organization which has received start-up funds from the University may have funds withdrawn from their account under the following conditions:

- a. After twelve months from the date of receipt of such funds, there has been no activity in the account.
- b. After two consecutive semesters, a formally recognized



organization has not completed the necessary requirements to maintain an active status with the Student Activities Office.

The student organization will be notified in writing and will have two weeks to appeal the decision to the Dean of Students. Any start-up funds withdrawn will be returned to the original source of funding.

- E. Participating Unit/Department: Each unit/department that receives a fee income allocation shall be credited the approved allocation. All income generated by those organization whose total operating budgets are reflected on the University books of account shall be credited to the appropriate account. All funds shall be expended in the same manner as the Student Service Fee.
- F. Authorized Signatures: At the beginning of each fiscal year the Vice Chancellor for Student Affairs shall recommend on Business Office Form 0009 those individuals who will have signature authority on Student Activity accounts. Students may not be granted sole signature authority on University accounts.
- G. Interest: Any interest realized by the University from the investment of fee income balances shall be credited to the appropriate reserve account.
- H. Carry-Over of Fund Balances: The Vice Chancellor for Financial Affairs may allow individual fund balances to be carried over at the end of a fiscal year when extenuating circumstances exist.
- I. Financial Reporting: These accounts will be reported monthly on the University accounting reports and an annual financial report will be prepared by a designee of the Vice Chancellor for Financial Affairs.
- J. Processing Procedures: All formal budget approvals, subsequent budget adjustments and other Business Office forms will be processed for the necessary approvals in accordance with normal University policies and procedures.
- K. Audit Authority: All expenditures of Student Service Fee income are subject to audit by the University Comptroller, the University Internal Auditor, and the State Board of Accounts.

#### SECTION IV: REGULATIONS GOVERNING THE ASSESSMENT AND REFUNDING OF STUDENT SERVICE FEES

- A. Mandatory Assessment: All undergraduate and graduate students will be assessed and required to pay the Student Service Fee.
- B. Refunds: Refunds of Student Service Fees will be done according to the approved refund schedule for the refund of course fees.