

# **The Finance Committee Guidebook**

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Published March 31, 2018

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## Preface

This guidebook was created primarily to serve as a manual for incoming and experienced finance committee members, and also as a resource for senators and treasurers regarding the most important finance rules and procedures. It is meant to be referred to throughout the academic year, especially in the face of a complex application. It aims to ensure all decisions made by finance committee are grounded with both precedent and good reasoning. Most importantly, this guidebook provides guidelines that can be generalized for nearly all situations, thus providing a standardized procedure. This is all to build greater transparency and accountability between this important decision-making body and the rest of the campus.

This guidebook is not exhaustive, for a full list of rules please read [The VSA Finance Guide](#).

## Background on Finance Committee (2012-2018)

The previous VSA structure (prior to the VSA Senate), was the VSA Council, which was composed of house presidents, among others. Only those who were elected members of the VSA council could join the Finance Committee; the relationship between the Finance Committee and the VSA body was mostly apathetic.

Alexander Koren '13, the Vice-President (VP) for Finance in Fiscal Year '13, enacted some reforms, of which most significantly were the rewriting of the VSA Finance Manual and the creation of Dashboard. Audits were done to analyze years of organizational spending, which included an analysis of reducing org waste. The results of this audit were used for annual budgeting and fund application decisions. The Social Consciousness fund was created in response to troubling campus incidents, and the A Cappella Recording Fund was created as well. One important takeaway for fiscal year '13 was the challenge of “managing practical aspects of prudent financial management against the VSA's guiding principles of fostering inclusion and promoting social justice.”<sup>1</sup> This statement arose from the context of a conflict between the Finance Committee and an ALANA organization regarding a large funding application.

The next VP in Fiscal Year '14, Michael Kaluzny '14, continued the integration of dashboard to organizational finances. The Finance Committee was still closed--only VSA Council members were allowed to deliberate. Kaluzny '14 pushed for less paperwork to help treasurers accomplish tasks and for greater transparency.

Maximilien Moran '17, VP in Fiscal Year '15, opened up the Finance Committee to the at-large student body by accepting applications and vetting applicants. Truly interested applicants were offered a place if they were dedicated to participate in decision-making by putting in the work and consistent attendance; if not, they would not be asked to return the next semester. The aim was to make the committee as diverse as possible to represent all of campus.

In Fiscal Year '17, Shahid Naeem '18 was the *Chair* of Finance, which was renamed after the new VSA senate came into effect. Dashboard was not used anymore in this fiscal year and it was ultimately discarded because of technical issues and a lack of support; a debt crisis was also experienced and resolved in this fiscal year. Members of Finance Committee were accepted through an application and vetting process established by a subcommittee of the Finance Committee.

In Fiscal Year '18, the appointment of new members to the Finance Committee began to be done through the Board of Elections and Appointments with limited input from Finance Committee members. Applications to the Speakers fund now undergo greater vetting procedures because of the VCLU event in fall of 2017. Funding decisions that go on the VSA Senate consensus agenda now carry more information. Robyn Lin '18, Chair of Finance for this fiscal year, had to deal with a challenging shift between dashboard and Workday, the latter of which has not been optimized for treasurer needs and for the Finance Committee.

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<sup>1</sup> Interview with Alexander Koren '13

## The Finance Process

This section will highlight the steps involved when applying for a **Special Purpose Fund (SPF)**. While most of the VSA budget is already allocated to organizations through annual budgeting, there are also Special Purpose Funds accessible during the academic year. They are divided into the following 9 categories:

### Special Purpose Funds

Fund	Deadline	Who can apply?	Purpose
<b>Administrative Offices</b>	At least 3 weeks prior to event date	Academic departments and Offices and all full Vassar organizations	Allocated to support any programming that an academic department or office of the college wishes the VSA to support. It must detail the impact it will offer to students and justify why the VSA should support it in conjunction with (or in lieu of) other funding.
<b>Capital</b>	No deadline	All Vassar organizations and pre organizations	This fund comes from an endowed fund, unlike the other funds which come from the Student Activity fee. It is available for purchasing capital items, defined as non-disposable goods that last for three or more years.
<b>Collaboration</b>	At least 3 weeks prior to event date	All full Vassar organizations	Supports events and activities that are co-sponsored and planned between dissimilar organizations, or organizations with differing viewpoints. The two collaborating organizations must have unique differences (e.g. Two residential houses or two theater groups do <b>not</b> qualify.)
<b>Community</b>	At least 3 weeks prior to event date	All full Vassar organizations	Supports events and activities with a primary purpose to offer outreach or engagement with the greater Arlington and Poughkeepsie communities.

<b>Conference</b>	At least 3 weeks prior to event date	All full Vassar organizations	Subsidizes organizations attending new conferences or off-campus events that they'd otherwise not have the opportunity to attend. There is a strict limit of 10 attendees per fund application at a maximum subsidized cost of \$1,000. Conference attendees are typically expected to make an individual contribution towards the overall cost of attending a conference supported through the Conference Fund.
<b>Discretionary</b>	If applying for \$5,000 or more, submit at least 4 weeks prior to event date. Otherwise, submit at least 3 weeks prior to event date.	All full Vassar organizations	Supports any activities or funding requests that fall outside the realm of any other funds, or supports other funds if they have been prematurely depleted during the academic year.
<b>Pre Organizations (Pre Orgs)</b>	No deadline	All pre orgs	Supports pre orgs that have not yet been allocated a budget, which they may request on a per-semester basis. The VSA Finance Committee and Organizations Committee jointly decide the funding limits that pre orgs may apply for.
<b>Social Consciousness</b>	1 week prior to event	All full Vassar organizations	Used to sponsor and support on-campus events and activities relating to gender, sexuality, race, ethnicity, religion, spirituality, and other issues pertaining to identity or social consciousness. Fund applications reviewed by the Committee on Equity and Inclusion, not the VSA Finance Committee.

<p><b>Speakers</b></p>	<p>If applying for \$5,000 or more, submit at least 4 weeks prior to event date. Otherwise, submit at least 3 weeks prior to event date.</p>	<p>All full Vassar organizations</p>	<p>Supports the bringing of speakers, performers, and panelists to campus.</p>
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**Important Notes:**

All fund apps submitted by Sunday 11:59PM will be reviewed at the following Finance Committee meeting.

Finance Committee meets every Wednesday at 3:15PM.

Final approval occurs at the weekly VSA Senate meeting, which occurs every Sunday at 7:00PM. In Spring of 2018 the VSA Senate meeting time was changed to 12:00PM.

## Example Application Timeline

**Event Date:** Wednesday, February 28th, 2018

**Final Deadline to Submit Application:** Sunday, February 4th, 2018

**Preliminary Decision:** Wednesday, February 7th, 2018

**Final Decision:** Sunday, February 11th, 2018

<b>February 2018</b>						
<b>Sunday</b>	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>	<b>Friday</b>	<b>Saturday</b>
28	<b>29</b> Submit to review on Feb. 7	<b>30</b> Submit to review on Feb. 7th	<b>31</b> Submit to review on Feb. 7th	<b>1</b> Submit to review on Feb. 7th	<b>2</b> Submit to review on Feb. 7th	<b>3</b> Submit to review on Feb. 7th
<b>4</b> Last day to submit to review on 2/7	<b>5</b>	<b>6</b>	<b>7</b> Finance Committee 3:15PM	<b>8</b>	<b>9</b>	<b>10</b>
<b>11</b> VSA Senate 7:00PM	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>
<b>18</b>	<b>19</b>	<b>20</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>
<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b> EVENT	<b>1</b>	<b>2</b>	<b>3</b>

### Important Notes:

In general, an application can be submitted any time before the final deadline.

For the specific example above:

- An application submitted any time before Sunday, Feb. 4th 11:59PM is on time.
- All applications submitted from Monday, January 29th to Sunday, February 4th will be reviewed on Wednesday, February 7th.
- All events occurring between Sunday, February 25th and Saturday, March 3rd have a final submission deadline of Sunday, February 4th at 11:59 PM

## Steps of Application

1. **Determine if your organization needs additional funds.** Read through the descriptions of the different SPFs to see which fund best covers your needs. Please be considerate of the fact that funds are limited, and always try to find ways to cut costs before applying for more money. SPFs are generally used for the following two reasons:
  - i. An org is hosting a new event that they have never done before, and their annual budget does not have any leeway. Note: If your org is annually budgeted to bring in speakers, then bringing in a speaker that has never spoken at Vassar, is *not* considered a new event.
  - ii. An org is hosting an annual event but there is a new, unforeseen cost associated with the event. For example, an event that never required security now needs two security guards present. If other elements of the event cannot be made any cheaper, and the additional cost is a burden for an org, then they may apply for funding.

2. **Choose the correct application form.** Find an email from the Chair of Finance with the subject line Special Purpose Funds Application. This is a Google Form, and is the official application for all SPFs except Capital fund. For Capital fund applications, find an email from the Chair with the subject line Capital Expenditure Fund Application. Star these emails for easy access. If you cannot find these in your email, they are also available to anyone with a Vassar email through the Google Drive folder “VSA Finance 2017-2018”. The forms are also linked here:

[Special Purpose Funds Application](#)

[Capital Fund Application](#)

3. **Fill out your application.** Carefully look through all the questions on the Google form you have selected and write your responses. We recommend you write them in a separate document to see responses more clearly. Do not leave any questions blank. If you have any questions about your application, come to the Chair of Finance office hours at your earliest convenience, prior to the fund’s deadline. For most of the SPFs, this deadline is three weeks prior to the event date. If you have questions, please make sure to come in much earlier than the final deadline, in order to ensure that your application is submitted on time.

4. One of two things can happen:
  - A. **Receive your preliminary approval.** On Monday, during Office Hours, the Chair of Finance, the Co-Chair of Finance, and the Finance Interns review all the applications submitted that week. If your application is deemed to be an undebatable decision, for example, you are asking for a very low amount of funds for something essential such as safety equipment, or you previously submitted an application that only needed some corrections and you have now resubmitted, then your application is approved and there is no need to make an appointment. You will receive an email if this is the case.
  - B. **Receive an email asking you to fill out a WhenIsGood.** If your application is not approved right away on Monday, then a WhenIsGood is sent by one of the interns to whichever email was used to submit the application. Have a representative from your org who is prepared to answer questions about the app and your organization's budget fill out the form (preferably the treasurer). The form offers 15 minute appointment times on Wednesday starting from 3:30PM to 6:00PM. Your appointment time will be confirmed by one of the interns by the end of the day on Tuesday.
5. **Show up to your appointment.** If you have made a 15 minute appointment with Finance Committee, please make sure you (or an informed proxy) arrive on time. Finance Committee interviews anywhere between 4 and 14 applicants on a single Wednesday, and one of the biggest concerns is making sure everyone gets the time they deserve. The **interview process** is as follows:
  1. From 3:15PM - 3:30PM, the committee goes over all the applications together and determines if there are things that need to be clarified by the applicants, or if there are any significant problems with any of the applications.
  2. At 3:30PM, the first applicant is interviewed.
  3. Names and pronouns are shared.
  4. A member of the committee will ask the applicant to give any new information surrounding the application.
  5. If the applicant wants, they can describe the event/reason for applying in more detail.
  6. Members of the committee will ask clarifying questions.
  7. If there are any extreme issues, they will be brought to the attention of the applicant at this point.

8. When there are no more questions, the applicant is asked to step outside of the VSA office briefly. During this time, the committee deliberates until a unanimous decision is reached.
  9. The applicant is brought back to the office and informed of the decision and the reasons behind it. The applicant is informed that this is a preliminary decision, that the final decision is made on Sunday at the VSA Senate, and that they are free to spend the funds they have been allocated after Sunday's final decision. Finally, they are informed that if they are unsatisfied with Finance Committee's decision, then they may attend the VSA Senate meeting to contest it.
- 6. Attend VSA Senate. \*Optional\*** If an organization would like to **appeal** the decision made by Finance Committee, then they should attend the VSA Senate meeting on the Sunday immediately following their interview. They will be given a chance to speak to everyone in attendance about why they disagree with the decision. Afterward the Senate will vote to determine the final allocation for the organization.
- 7. Orgs can go ahead and spend their money!**

## Roles

### Co-Chairs of Finance (Elected and Appointed)<sup>2</sup>

- Oversee the disbursement of the student activities fee to all organizations, preliminary organizations, Special Purpose Funds, and other uses deemed necessary through the appropriate channels.
- Make recommendations to the VSA Senate on funding allocations of the student activities fee.
- Call mandatory meetings of organization treasurers as needed.
- Serve as the primary liaison to Accounting Services, Accounts Payable, Purchasing, and other relevant offices within the Vice President of Finance and Administration division.
- Chair the Finance Committee (set the agenda and lead the meetings)
- Hold weekly office hours and answer treasurer questions
- Speak on behalf of Finance Committee at Senate should an organization choose to appeal a decision

### Interns

There are two interns assigned to VSA Finance-- usually at least one will be with the Chair for office hours. The interns work closely with the chair to ensure the fiscal health of the VSA, and actively participate in office hours to assist the chair and treasurers. This is a paid work-study position for which qualified students may apply. They perform duties such as:

- Emailing applicants to schedule a time slot for Wednesday's committee meeting
- Compiling the agenda for each finance committee meeting
- Writing down extensive notes during committee meetings
- Collaborating with other interns to communicate finance information necessary for other meetings, like senate
- Completing work-day reimbursements
- Assisting treasurers when completing transactions with the VSA's Purchasing Card
- Filing away financial records like reconciliation forms
- Organizing physical and virtual financial data in spreadsheets and forms

### Finance Committee Members

- Read the agenda and prepare questions and concerns about incoming applications
- Attend finance committee and actively participate
- Attend annual budgeting in the spring
- Answer finance questions for treasurers or direct them to the appropriate resources (SARC office, Co-Chairs of Finance, VSA Exec Board Members, Interns)

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<sup>2</sup> VSA Bylaws: Article 1, Section 7

## How Finance Deliberates

The following are selected fund applications from fiscal years '18 and '17-- they contain comments from the authors and a previous co-chair of finance, Neena McBaer '17, to delineate as much as possible the thinking process and rationale behind the evaluation of an organization's fund application. This section is useful for both finance committee members and treasurers as well as the larger community. It is hoped that with these example applications, those interested may gain much from concrete examples with the different requirements and key components of applying to different funds, such as the conference fund and speakers fund. The organizations that are featured have been asked for consent regarding the addition of their application, and the specific application was **only** included by the merits of its content and the usefulness it could present as an example application for the benefit of the wider student body.

## Example Collaboration Application

### Organization Name:

Quidditch and Ballroom

### Which fund are you applying to?

Collaboration

### Event Name:

Yule Ball

### Location of Event:

Aula

### Date of Event:

12/2/2017

Great description- covers everything that will occur at the event. Concise and to the point.

### Description of Event:

The Yule Ball is an annual dance in the Aula at the end of the semester. It is a formal event with live music and great food that is based on the Yule Ball written about in the Harry Potter series. Live music is provided by the Jazz band. There is a photo booth! There will also be a midnight Waltz performed by members of the ballroom club. Food for the evening will include Harry Potter themed sweets: cauldron cakes, pretzel chocolate-dipped wands and golden snitches.

### Benefit to Students and/or your Organization:

Students who come to the Yule ball will enjoy a fun night of music and dancing. Because of this event, more students will be aware of the Quidditch Team and ballroom club. They may be interested in joining the Quidditch team or attending ballroom club classes. Since the ball includes live music and has a classy atmosphere, the event in the past has never gotten out of control and students tend to not come intoxicated. While it is not advertised as a substance free event, it is not an event associated with alcohol or drug consumption, making it an overall accessible event to all students who want to have a fun and safe night.

### Cost of the Event (Itemize and be Specific):

Total food cost: \$138

Devil's food cake: \$10

Marshmallows: \$6

Vegetable oil: \$3

Eggs:\$4

Rolos: \$10

Peanut butter: 4 jars (\$15)

Butter sticks: 5 sticks(\$10)

Confectioners sugar 3 bags (\$10)

Rice krispies 12 cups of rice krispies (8.25 cups-ish/1box) 2 boxes, maybe 3 to be safe \$7

Pretzels (2 boxes): \$10

Sprinkles: \$9

Chocolate bar: \$8 (6 bars? Possibly more)

Excellent itemization, every single cost is included and totals are separated by category, i.e. "Total food cost"

Cupcake liners (\$5)  
 Ziploc bags (\$5)  
 Wax paper (\$10)  
 Total Decorations cost: \$30  
 String \$5  
 Tape \$5  
 Streamers \$10  
 Tablecloths \$10  
 Jazz Band: \$150  
 Paid student photographer: \$50

All these costs we expect to pay because they are the costs from previous years.

However, the new cost this year is the cost for security which we did not require in previous years.

The event is 3.5 hours

Security guard @\$25 an hour comes to \$87 for security

Crowd control @\$20 an hour comes to \$70 for crowd control

In Finance Committee (FC), applications like this that request more funds for annual events will have their annual budgeting history pulled up. FC compared notes and saw that to ensure the success of this event, additional funding was needed.

### **Current Funding Plan (How will YOU pay for the event):**

Both orgs have been budgeted for this event. Therefore for the main components of the event we will be able to pay (\$168 from Quidditch and \$200 from Ballroom).

The Quidditch team has done significant fundraising this fall with the sale of merchandise to players, family and friends. While Yule Ball does not require a charge, we are going to be a fundraiser in conjunction with it. Students will compete in a Penny Wars fundraiser. We are currently working with ResLife to setup Brewer House Cup points to be awarded for the houses that raise the most money.

As for Ballroom, we plan on holding a dance-a-thon fundraiser to create interest in the club, and to support fellow students and faculty participating. We hope that it will be enjoyable and create more interactions. We hope that this method will raise \$50. Other than that, we also plan on holding private lessons in preparation for the Yule Ball and for the holiday season (Valentine's Day, Christmas, New Year's) to help pay for the event and for future events. Through this, the club hopes to raise another \$70.

A main reason our orgs cannot pay for this additional security charge is that we are both saving our limited budgets for next semester's activities. The Quidditch team needs to be able to pay for travel to away tournaments while ballroom holds a well attended event called Dancing with the Professors. If we use only our budgets for this event it will be impossible to hold this future programming.

### **List of Attendees (First name, Last name, Class year - when relevant, and/or attendance goals):**

*[Attendance list redacted]*

**Collaborating VSA Organizations and/or Academic Offices and/or Administrative Offices and HOW they are contributing both financially and in kind:**

This is a collaboration between Quidditch and Ballroom club. Ballroom club is paying for the Jazz band (cost \$150) and the hired student photographer (\$50). Quidditch is paying the \$168 for all the food and decorations. The security costs are \$157. We are asking for only \$157 to pay the security and crowd control charge.

**Total cost of event:**  
\$525

**Amount requested from VSA:**  
\$157

The VSA can pay the student body, like photographers, but this can only be done through the college's student employment hourly wage and with proper paperwork filed with the student employment office.

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## Example Conference Application

**Organization Name:**  
MBSA

**Which fund are you applying to?**  
Conference

**Event Name:**  
National Women's Studies Association Conference: 40 YEARS AFTER COMBAHEE: Feminist Scholars and Activists Engage the Movement for Black Lives

**Location of Event:**  
Baltimore, MD

**Date of Event:**  
11/16/2017

**Description of Event:**  
"NWSA is an organization of feminist scholars and scholar-activists that emerged out of the social movements of the 1960s and 70s. It is fitting then that since our 40th anniversary conference will take place in Baltimore, the site of the massive Black Lives Matter (BLM) protests of 2015, and in the year that marks the 40th anniversary of the Black feminist manifesto, the Combahee River Collective (CRC) statement, that the theme of our annual gathering will be: "40 years after Combahee: Feminist Scholars and Activists Engage the Movement for Black Lives."

The Movement for Black Lives (M4BL), also referred to as the Black Lives Matter Movement, is a Black-led movement, comprised of multiple organizations, with widespread support in people of color and progressive white communities in the United States as well as internationally. Solidarity actions and delegations have linked M4BL to Palestine, Brazil, Canada, England and South Africa, as well as the immigration rights movement and indigenous and First Nations'

struggles across North America. Significantly, this is the first mass movement with such a broad reach that is being led by young Black feminist organizers, many of them queer and trans. They have reconfigured how we think about race, gender, sexuality, violence, politics, and power in the 21st century.

The question this conference theme poses is how do we make Black lives matter in our own feminist research and praxis and how do we stand in solidarity with the growing and broad-based movement against state, gender-based and other forms of violence?" (<http://www.nwsa.org/cfp>)

### **Benefit to Students and/or your Organization:**

This conference is a critical convening within feminist discourses and will give students an opportunity to engage with activists and scholars who are making transformative interventions within anti-Black national and global regimes. Most of the Vassar attendees are Women's Studies majors or are enrolled in Diane Harriford's course, Black Feminisms. Our experiences at this conference would directly enrich, complicate, and expand our understandings of feminist theory and practice. Furthermore, [redacted] and [redacted] have arranged for attending Vassar students to stay with Johns Hopkins students who are involved with Students for Justice in Palestine. This will help facilitate inter-college community bonding as well as foster discussion about how students at JHU have navigated college activism.

### **Cost of the Event (Itemize and be Specific):**

Food

\$1,800 (15 people \* \$30/day \* 4 days)

Transportation

\$2,775 (\$185/student \* 15 students)

Registration

\$2,325 (\$155/student \* 15 people)

Total

\$6,900

Great job showing cost per person for every aspect of event- food, transportation, registration. We prefer this! It gives us a better idea of costs instead of just seeing the final number at the end.

### **NEW INFO:**

Luckily, a number of people have dropped out, so we now have a group of 9 people in total.

We are applying now for funds to support 4 people, since the other 5 are applying to the academic enrichment fund and their departments.

Also, we are no longer taking Amtrak, since multiple attendees have offered to drive folks down.

Although this application has costs listed for 15 people, they are only applying as if four people would go because the rest are covered.

This brings the costs down to \$265/person, and we are only asking for 4 people. The total costs of these 4 people would be \$1,060. Since I realize y'all will give \$1,000 in total, we will be asking those 4 people to contribute \$15 to eliminate the \$60.

**We are now requesting \$1,000 from the VSA Conference Fund.**

**Current Funding Plan (How will YOU pay for the event):**

We have reached out to multiple departments (Africana Studies, History, Sociology, American Studies, Political Science) and many have said that they cannot sponsor student events such as this. We are asking that a few people in the group apply to the Academic Enrichment Fund. Some of us cannot apply to this fund, though, because we have theses or other academic projects that we need to use the Fund for. Hopefully [sic]

We look for a good mix of class years, with more emphasis on younger class years. In the case of spring conferences, we would not provide funding for any seniors. Since this conference occurred in the fall, we were able to fund the senior attendees.

During FC, we asked what their plan B was in case the academic enrichment fund was not granted.

**List of Attendees (First name, Last name, Class year - when relevant, and/or attendance goals):**

*[attendance list redacted]*

**Collaborating VSA Organizations and/or Academic Offices and/or Administrative Offices and HOW they are contributing both financially and in kind:**

Johns Hopkins University students have agreed to host all 15 of us. This significantly cuts down on costs.

**Total cost of event:**

\$6,900

**Amount requested from VSA:**

\$1000

## Example Speakers Application

**Organization Name:**

The Limit

**Which fund are you applying to?**

Speakers (if you are applying to speakers there are additional mandatory questions at the end)

**Event Name:**

Chris Fleming

**Location of Event:**

Sanders Auditorium

**Date of Event:**

Feb. 23

Would be good to include length of time comedian will perform, but otherwise great, concise description.

**Description of Event:**

A night of Chris Fleming's stand-up routine after 20-30 minutes of student comedians as an opening act.

**Benefit to Students and/or your Organization:**

Chris Fleming would provide an evening of his classically absurd and hilariously fresh stand-up performance for the entire student body. Additionally, Fleming would provide student comedians the opportunity to open for and work with a professional comedian.

**Cost of the Event (Itemize and be Specific):**

\$3,000 – Fleming's honorarium

\$150 – 1 night of accommodation at Alumni House for Fleming

Excellent- we can clearly see how dedicated the Limit is to bring this speaker to campus!

**Current Funding Plan (How will YOU pay for the event):**

Unfortunately, with the show schedule the Limit currently has coupled with its allotted budget, it does not appear possible for the Limit to fund Fleming's performance at this time. However, we are willing to cover the cost of his meals during his stay.

**List of Attendees (First name, Last name, Class year - when relevant, and/or attendance goals):**

Our attendance goal is the maximum capacity that Sanders' Classroom will allow.

It would be better if actual max capacity was written here, but this is acceptable.

During finance we would ask how much collaborating orgs have decided to contribute; no amount is too small to mention!

**Collaborating VSA Organizations and/or Academic Offices and/or Administrative Offices and HOW they are contributing both financially and in kind:**

Both sketch comedy groups No Offense and HEL have offered to collaborate with the Limit in terms of supplying opening acts, but also small financial donations. We are striving to include as much of the Vassar comedy scene as possible with the Chris Fleming event.

**Total cost of event:**

\$3,150

**Amount requested from VSA:**

\$3,150

**Speakers Bio**

Chris Fleming is a comedian known for his zany comedic videos that range in a variety of different topics, his well-known character "Gayle", impressions of politicians, and car rants

where he complains about purple cauliflower, theater kids, and adventure dads. Chris Fleming received a degree in theater from Skidmore College began doing stand-up comedy in 2005, and in 2016 and 2017 he toured the United States with his stand-up comedy show titled Showpig.

**Title of Speech**

Chris Fleming

**Description of Speech**

Chris Fleming's stand-up set after 20-30 minutes of student comedians as opening acts. This could take the form of sketch, stand-up and/or improv.

**What is the purpose of this speech? More specifically, how will this benefit the campus or your organization?**

The purpose of Chris Fleming's performance is to introduce this absurd and non-traditional style of comedy to Vassar's comedy scene and campus in general. Additionally, Fleming's visit will give student-comedians the opportunity to watch and perform with a professional comedian as well as provide the general student body with an evening of laughs.

**Please provide examples of the speaker's social media (instagram, facebook, twitter etc)**

Facebook: <https://www.facebook.com/chrisflemingfleming/>

Twitter: <https://twitter.com/chrisfluming?lang=en>

Instagram: <https://www.instagram.com/chrisflemingfleming/?hl=en>

**Has this speaker spoken at Vassar before? If so, how did it go?**

No

## Guidelines for All Applications

- Are there any collaborating orgs (even just in name and publicity, not just in financial contribution)?
- Are members of the organization personally contributing to the event?
- How much is the organization contributing to the event?
- How much is the organization requesting?
- How many times has this organization applied for funds, and how much money has been given to this organization through special purpose funding and through annual budgeting?
- Is the organization trying to bring alumnae/i to campus? Recent alumnae/i (within last 5 years) are not paid honorariums by the VSA, but the VSA can cover other costs such as travel, hotels, and meals.
- Does this application break any rules or have any red flags:
  - Late application?
  - Started advertising before approval?
  - Signed contracts before approval?
  - Plan to buy prohibited items? (alcohol, gifts, capital with a non-capital application)
  - Spent money before approval?
  - Are current students going to be paid for services? (photographers, DJ's, artists, workshops) If so, specify hourly wage (Must be approved Student Employment Hourly Wage).

## Guidelines for Conference Fund<sup>3</sup>

Note: Having a Red flag is not an automatic disqualification for getting approved-- the Finance Committee will take all factors into consideration.

- **Class Year** – What class years are attendees?
  - Good examples:
    - Mix of sophomores and juniors
  - Red Flags:
    - All attendees are seniors taking a “senior trip”
- **Special opportunity** – Is this a “one off” or something that happens every year?
  - Good examples:
    - Vassar Dems attend a caucus in a major election year.
  - Red Flags:
    - Org attending the same conference multiple times (if conference is annual, should be annually budgeted)
- **Cost/benefit** – How much of the funds is going directly to the conference, and how much on auxiliary expenses (travel, lodging, etc)?
  - Good examples:
    - Debate Team travels to a tournament at Cornell. They sleep in dorm rooms and food is provided, so the only costs are event fees and gas.
  - Red Flags:
    - Anything involving asking VSA for hotels or airfare.
- **Benefit to others in org** – Will attendees bring back knowledge they can share with others to help achieve the organization’s mission statement in a meaningful way?
  - Good examples:
    - 2-3 members of the Barefoot Monkeys attend a workshop on how to use a new type of toy. They return and teach others in the org the skills they learned.
    - The President of Outdoor Club attends a seminar on wilderness survival skills that will help them lead future excursions.
  - Red Flags:
    - Most or everyone in the org is attending
    - A significant number of listed attendees have already gone before
    - Event is networking-focused in nature; you must be present to benefit.
    - Event is mostly “fun”
- **Benefit to campus** – Will attendees bring back knowledge they can use to have a positive impact on the entire campus?
  - Good examples:
    - Leadership training for the VSA President or Miscellany News EIC.
    - Presidents of multiple ALANA orgs attend conference on how to work together to tackle issues of marginalization on campus.
  - Red Flags:
    - Impact is unclear
    - Only a few individuals benefit (less than 5)
    - No clear plan for what to do with information learned at conference

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<sup>3</sup> Guidelines adapted from Alexander Koren ‘13

# Annual Budgeting

This section will highlight the most important aspects of the annual budgeting process.

## Steps of Application

1. **Prepare all of the organization's financial information.** Make sure all costs incurred by the org have been totaled and noted somewhere in an organized manner, preferably on an excel sheet or on the Budget Tracker.
2. **Get in touch with the new treasurer.** If the organization will have a new treasurer in the upcoming year, then the new treasurer must work together with the current treasurer on the organization's annual budget.
3. **Prepare responses to the following questions:**
  - What are the names and contact information of the organization's current executive board? (must include treasurer)
  - What are the names and contact information of the organization's upcoming executive board? (must include treasurer)
  - What is the mission/purpose of the organization?
  - How many people are on the email list?
  - Describe the organization's typical general body meetings. (Is food served at meetings? How many people attend?)
  - How frequently are general body meetings held?
  - What general operating costs does the organization have? (Food, non-capital supplies, printing costs, transportation)
  - What events has the organization put on this year?
  - What events will the organization put on during the remainder of the year?
  - Are there any new events that the organization has never done before that are being planned for next year?
  - What fundraising has the organization done this year?
  - What capital items does the organization have in its possession?
4. **Fill out the Application and Treasurer Check-List.** Organizations will fill out an application that details all annual costs, and a treasurer checklist to detail future leadership, capital items in their possession, and fundraising numbers.

## Evaluation Considerations

In making recommendations to senate for the following year's budget, the Annual Budgeting (AB) Task Force takes several factors into account.

- The estimated total budget of the next fiscal year- the chair will calculate this number by averaging the last six semesters of total enrollment minus any debt incurred to the student activities fee.<sup>4</sup> The Task Force will then begin the annual budgeting process based on this figure.
- Which events and conferences are annual. The Task Force will refer to the annual budgeting application as well as the Budget Tracker to see which events and conferences are annual. Those organizations which have a solid track record of such events and conferences will have those costs allocated first.
- Organization operating costs, like general body meetings. Unless operating on a lower total budget amount than usual, the Task Force will attempt to stay within the last budget for costs like these, and, if demonstrated, will fund more for growth.

Please note, however, that these specific costs are examined to ensure VSA Funds are not being abused or misused, such as by providing food for every general body meeting. While there are exceptions, such as identity orgs incorporating food as an important part of meetings within their mission statement, the fact that the ACDC and other on-campus dining options no longer have limited swipes per semester means that costs such as food will be critically analyzed to ensure they are an intentional part of programming.

These considerations are taken into account to ensure the Student Activity Fee is fairly dispensed and to avoid as much waste and inefficiency as possible. It is important to note that most organizations will usually ask for an annual budget that is far greater than their current annual budget - if the Task Force were to fund these amounts as requested, the VSA would go into debt. The Task Force attempts to stay as close as possible to the current fiscal year's budget while also keeping some marginal room for growth.

Additional records such as Work Day and purchasing card reconciliation forms may be used to confirm costs and answer any questions that may arise during the annual budgeting process.

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<sup>4</sup> VSA Bylaws: Article 9, Section 3

## Who Takes Part?<sup>5</sup>

- Finance Committee
- Planning Committee
- Organizations Committee
- VSA Executive Board

## Annual Budgeting Timeline

An organization may appeal the decision made by the Annual Budgeting Task Force for any reason. An organization has two opportunities to appeal, once to the AB Task Force, and once to the Senate during final approval. The following are the approximate dates that the entire annual budgeting process occurs:

### Last week of March

Annual Budgeting Application goes live. Treasurers will have one and a half weeks to fill out the application. Late submissions will not be accepted barring extenuating circumstances.

### Second week of April

Annual Budgeting Application closes. Appeal window opens. Organizations may appeal to the Annual Budgeting Task Force.

### Last week of April

Appeals are concluded. Final budget is presented to the Senate. Organizations may appeal to the Senate.

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<sup>5</sup> VSA Bylaws: Article 9, Section 4

## Sources

### People:

Chair of Finance FY18 Robyn Lin '18

Co-Chair of Finance FY17 Neena McBaer '17

VP of Finance FY14 Michael Kaluzny '14

VP of Finance FY13 Alexander Koren '13

### Organizations:

The Limit

MBSA

Ballroom

### Documents:

[The VSA Finance Guide](#)

[VSA Bylaws](#)