SOOF Budget Assumptions and Instructions

Because budgeting is an economic forecast for the future, it is necessary to make some assumptions about key factors that will impact the operations of the Undergraduate Students Association. While assumptions may not always prove to be accurate, it is important to have a clear understanding of USA's working assumptions from the outset. Therefore, these budget assumptions will ensure that all Organizations' budgets are developed on a consistent basis.

Along with the assumptions, we have included instructions for each worksheet that needs to be completed in order to have a comprehensive budget proposal.

**Approval and Cover Page**
Fill in your Organization’s name on the appropriate line. In the Approvals section, the individual responsible for the budget must sign on the line titled “Signature of Officer”. In addition, the group’s Advisor in the Center for Student Programming must also sign off on the Approval and Cover Page.

**Group Narratives**
Answer three separate questions entitled, “Description of Organization”, “Statement of Campus Value”, and “Statement of Purpose and Objectives”.

**Line Item Totals**
From each individual line item worksheet, transfer the total to the Line Item Totals Page to get a total. The total should equal the **total requested**.

**Budget Detail Worksheet Instructions**

**Assistance**
Enter the name of each stipended position from your Organization on a separate line. Next enter the amount of their monthly stipend and their total amount for the stipend period. Use the stipend rates listed below in determining stipend levels. Be sure to adhere to the General Assistance Policies set forth below.

The Assistance Computation worksheet provided in the budget package online is intended to help organization leaders develop a payment forecast for each stipended official in their organization.
General Assistance Policies

1) All stipended individuals must meet all eligibility requirements as outlined by the USAC Constitution and Bylaws. These requirements are:

   A. All stipended persons must have an overall GPA of at least 2.0 and be enrolled in and ultimately complete at least four units in each quarter for which they receive stipend.

   B. All stipended persons must fill out completely (signing the backs of pages as well) the yellow NEW HIRE FORM. These forms are available from Student Government Accounting.

2) No individual may receive more than one stipend, or may receive both a stipend and work-study.

3) Please note: Student Government Accounting’s deadline for all new hire paper work is the Friday of 3rd week each quarter.

4) All USAC stipended positions must be effective the 1st of the month; and ALL positions will automatically terminate on May 31st.

5) Every student who receives a stipend from USAC is entitled to the ASUCLA Student Employee discount during the period that they are stipended.

6) No more than 60% of the total SOOF allocation may be used for Assistance.

Please refer to the following for the official USAC Stipend Titles and Pay Rates:

<table>
<thead>
<tr>
<th>Stipend Title</th>
<th>Maximum Quarterly Pay Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>President or Chair</td>
<td>Stipend shall not exceed $521 per quarter.</td>
</tr>
<tr>
<td>Vice President</td>
<td>Stipend shall not exceed $379 per quarter.</td>
</tr>
<tr>
<td>All other Elected Officers</td>
<td>Stipend shall not exceed $284 per quarter:</td>
</tr>
<tr>
<td>All Appointed Officers</td>
<td>Stipends shall not exceed $189 per quarter.</td>
</tr>
</tbody>
</table>

Stipend period effective for the Winter/Spring quarters starting January 1st to May 31st.

Supplies
For the purpose of your own control, review your office supply expenditures over the past year and attempt to identify office supply expenses which will occur in the coming fiscal year. Examples might be forms, printing supplies, materials, and others. Office supplies can be purchased at the UCLA Store, and your Student Organization is entitled to a 20% discount on most office supply items. Don’t forget to include sales tax with your total cost.

Graphics
The Graphics account is used for your various graphic service needs. Graphics expenses include photocopying and printing of business cards, flyers, brochures, evaluations, programs, etc. Don’t forget to include sales tax with your cost. All printed material must include “Paid for Revised July 15, 2013
by USAC” and “Sponsored by (name of your organization).” Graphics must include the USAC Logo if these expenses will be funded in part or in whole by USAC.

Sample USAC Logo:

![Sample USAC Logo]

**Telephones**

All Student Organizations housed in Kerckhoff Hall will no longer budget for telephone lines and instrument costs individually because these costs are now included in USAC’s Administrative Overhead expense. Please be aware that all outgoing calls on USAC phone lines are restricted to campus only. In order to have the ability to make off-campus calls, you will need an Authorization Code. Expenses incurred using Authorization Codes, which allow off-campus access, are the responsibility of the individual organization and are not covered under this budget. Student Organizations not housed in Kerckhoff Hall are not eligible for any telephone funding.

**Advertising**

The Advertising account is used for your staff recruitment needs. List all anticipated ads to be run in the Campus Media (Daily Bruin, any of the Bi-Quarterlies). Refer with SGA or the Student Media office for the current year’s rates. During the course of the year, please reference the funding source (with the Paid for by USAC Logo and funding source). The omission of the funding source can delay the process.

**General T-Shirt Policies**

1. T-shirts may not be purchased to advertise specific events or programs. T-shirts can only be purchased as advertisement for an organization as a whole.
   a. For example, you may purchase T-shirts for the Chess Club at UCLA; you may not for the Chess Club at UCLA’s Annual Ski Trip.

2. T-shirts funded in part or in whole by USAC must be purchased through ASUCLA Licensed dealers; a list of dealers is available for download at [www.asucla.ucla.edu/licensing/licensees.asp](http://www.asucla.ucla.edu/licensing/licensees.asp) (See ‘UCLA License List - By Product Category).

3. Student groups must follow all trademark and licensing guidelines if choosing to use the UCLA name, logo or seal. USAC will not be held liable for any repercussions due to trademark misuse. Find guidelines at [http://www.asucla.ucla.edu/licensing/trademarkuse.asp](http://www.asucla.ucla.edu/licensing/trademarkuse.asp).
   a. Note that choosing to use the UCLA name/logo/seal may delay the speed of delivery for T-shirts as licensed dealers must approve these requests through UCLA’s Trademark offices before distribution.

Revised July 15, 2013
4. USAC will only fund one T-shirt design per group each academic year.

5. T-shirts must include “Paid for by USAC” and must include the USAC logo (minimum dimensions for logo: 3” tall) if these expenses will be funded in part or in whole by USAC.

6. T-shirts are the only eligible items of clothing USAC will consider funding through the Student Organizations Operational Fund Advertising line item.
   a. Other items like: tote bags, sweatshirts, sunglasses, socks, etc. are prohibited.

7. Content on T-shirts should be respectful in nature, using appropriate language, images and messaging.
   a. Groups must submit an example of the front and back of their T-shirt design in order to be granted funds.

8. Don’t forget to include sales tax with your cost.

9. If all guidelines are not met, funds for T-shirt advertising will not be considered.

Retreats, Meeting and Conferences
Each Organization that proposes any significant travel or meeting expense must prepare a "Retreats, Meetings and Conferences" worksheet for each event. Use the worksheet provided in this budget package, and make additional copies if necessary. Each travel or meeting expense proposal must be completed with the following items:

1. Specify which Student Officer(s) or staff members will be traveling and/or in attendance at the event and covered by the budget you are proposing.

2. Specify the name, date and location of all meetings, conferences or conventions to be attended. Where necessary, also specify the name of the office/commission or organization that is sponsoring the event.

3. Specify the items that are to be covered by the budget you are developing, for example airfare, hotel, ground transportation and other expenses. Per Diem maximums are $35 per day per person for hotel and lodging; $15 per day per person for incidentals; and $50 per trip for transportation.

4. In narrative fashion, specify why the trip is important to your Student Organization. Explain what essential information will be obtained from the trip. If it is important for the Student Organization to routinely attend annual conferences or conventions, explain how attendance enhances the attendee’s ability to improve service to the UCLA student population. How many years in the past has the Student Organization attended this or similar meetings, conferences or conventions?
5. Any program that has received USAC funds must present a written evaluation or report to USAC within two (2) regularly scheduled USAC meetings after the completion of the conference.

6. Retreat travel must take place within 250 miles of the UCLA Campus. Each request for retreat travel must include: an agenda, statement of purpose and a list of attendees.

7. Admission tickets to performances, movie theaters, amusement parks, musicals or anything of this sort is prohibited. Items not listed will be left at the discretion of the Finance Committee Chair for final approval.

**Transition**
This line item is not budgeted in the SOOF budget process.

**Period for SOOF Expenses**
Allocated SOOF Funds must be *used or accessed* between the first Friday of October and the last Friday of April.

**Budget Proposal Checklist**
Be sure to complete the checklist located at the bottom of the cover page. Important criteria that will be used by the BRC will be completeness of your budget proposal. Don’t lose valuable points by turning in an incomplete, Budget Proposal. Remember, typed proposals are preferred.