

# Meeting of the Clubs

Led by StuCo Treasurers Anagha and Erin  
With special guests: SECS Co-Head Kelly and Student  
Engagement Staff Jodi, Tyler, and Ciera

# Attendance



# Overview

01

## Important Dates

Timeline of Budgeting Processes

02

## Budget Requests

Overview of the guidelines and expectations

03

## Sample Budget

What a GOOD budget request looks like

04

## Important Changes

SEF, history and heritage months

05

## Rolling Budgeting Process

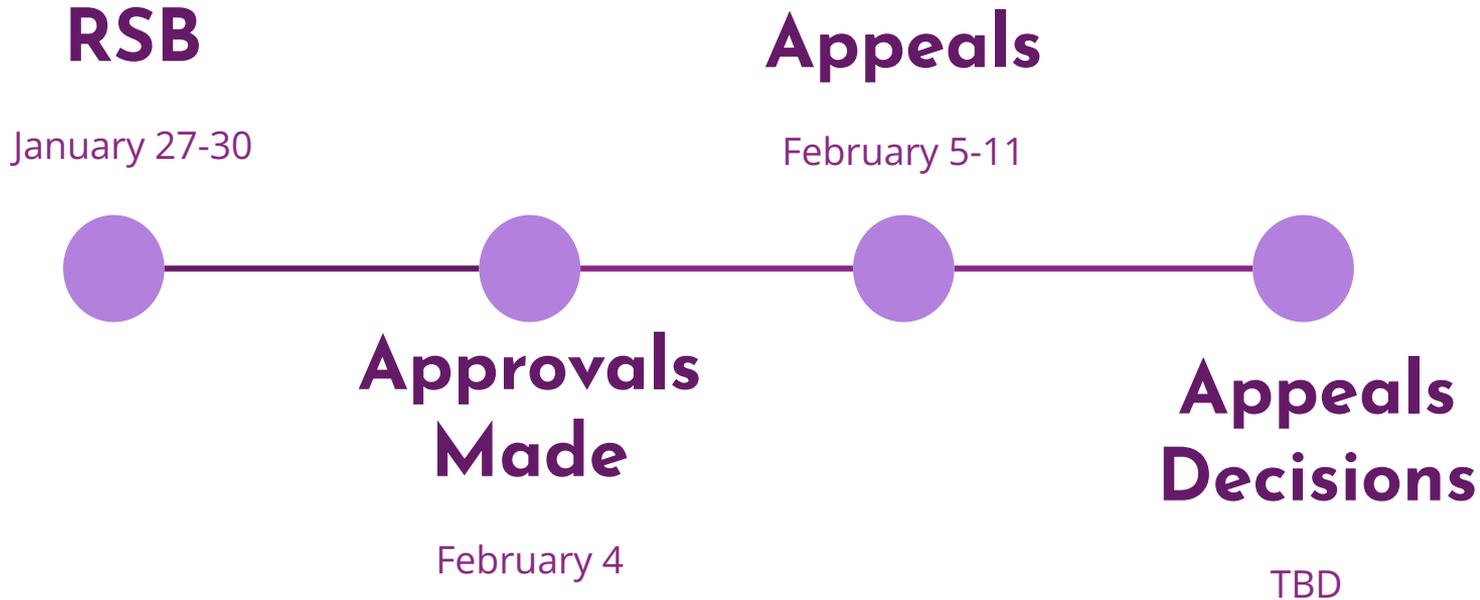
How to request funds throughout the semester

06

## Student Engagement

Hear from Jodi Mulhall and Tyler Eiseman about Purchasing and Club Sports

# Regular Semester Budgeting and Appeals Timeline



# Eligibility for Budget Requests

- Attendance at Meeting of the Clubs by at least one member of your organization (treasurer preferred) is **mandatory**
- To qualify for funding, you must have a Haverford **co-head, treasurer, and 3 additional Haverford student members** (5 total members) and be successfully registered as a Haverford Club in Engage (this includes Bi-Co clubs!)
- For regular semester budgeting, requests must be submitted between **January 27-30**

# Budget Submission Guidelines

- Be realistic with your budget – plan events that are actually feasible for this semester
- Request everything you think your organization needs, but it is very helpful to note which items are the most important
- Requests must be **SPECIFIC**- amount of people in attendance and potential date of event, exact supplies/materials needed, include links (if applicable) to items you want to purchase, and provide exact costs (includes tax and shipping)
- Requests will be denied if they are too vague e.g.
  - Events that aren't planned
  - A sum of money with no specifics provided
  - "Snacks and decorations: ~\$100"

# Getting Your Funds and Using Them

- In order for approved budgets to be allocated, the **Allocation Agreement** must be signed
- Purchase requests **must** be submitted for items approved by Students' Council via Engage, and will be received by Student Engagement staff
- When submitting a purchase request **group items by vendor**
- All requests must be submitted AT LEAST 2 weeks in advance (4 for catering)\*
- Orders will only be placed on Tuesdays and Thursdays. Orders submitted by 10am on that day will be placed; others will wait for the next ordering day.
- Reimbursements **MUST** receive pre-approval from Student Engagement (hc-engage@haverford.edu) and based on specific scenarios. Never **ASSUME** that you will receive a reimbursement.

# Sample Budget

- **Description**

The mission of the Alliance of Latin American Students (ALAS) is to create an intentional space where Latinx identifying students can comfortably share their experiences, find academic, social, and emotional support, and work with other Latinx students to achieve common goals. ALAS is committed to celebrating the vast diversity of cultures that are represented within the Latinx identity and we strive to make the spaces we create as open and inclusive as possible to ensure that all members of ALAS can grow, thrive, and feel supported by the organization.

# Sample Budget

## Dia de las Velitas

1. <a href="#">Bunuelos</a>	expense	45 x \$1.35	\$60.75
2. <a href="#">Almojabana</a>	expense	45 x \$1.35	\$60.75
3. <a href="#">Pandebono</a>	expense	45 x \$1.50	\$67.50
4. <a href="#">Deditos</a>	expense	45 x \$3.00	\$135.00
5. <a href="#">Empanadas</a>	expense	60 x \$1.39	\$83.40

## Dia de los Muertos

1. <a href="#">Pink Lemonade</a>	expense	3 x \$0.00	\$0.00
2. <a href="#">Grenadine Syrup</a>	expense	1 x \$0.00	\$0.00
3. <a href="#">Cran-pomaganite Juice</a>	expense	1 x \$0.00	\$0.00

## Strike Legacy Panel

1. <a href="#">Tamales Tray (El Limon)</a>	expense	1 x \$50.00	\$50.00
2. <a href="#">Quesadillas (El Limon)</a>	expense	2 x \$45.00	\$90.00
3. <a href="#">Taco Tray (El Limon)</a>	expense	2 x \$55.00	\$110.00
4. <a href="#">2 Trays of Chips (El Limon)</a>	expense	2 x \$10.00	\$20.00
5. <a href="#">Guacamole (El Limon)</a>	expense	1 x \$50.00	\$50.00

# Sample Budget

## Review Line Item

### Line Item Category

#### Name

Table Runner

#### Description

Will be used as decoration for the alter

Link: <https://www.amazon.com/Nepnuser-Mexican-Muertos-Kitchen->

#### Quantity

2

X

#### Cost

\$ 9.99

=

#### Total

\$19.98

CLOSE

# Sample Budget

## Autana Catering (Event TBD)

1. <a href="#">Rice Tray</a>	expense	2 x \$30.00	\$0.00 ↓
2. <a href="#">Dozen assorted empanadas</a>	expense	6 x \$60.00	\$0.00 ↓
3. <a href="#">Shredded Chicken</a>	expense	2 x \$90.00	\$0.00 ↓
4. <a href="#">Pulled Pork</a>	expense	1 x \$90.00	\$0.00 ↓
5. <a href="#">Delivery or Uber(Round Trip)</a>	expense	1 x \$70.00	\$0.00 ↓

# Sample Budget

## Ski Trips

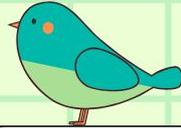
1. <a href="#">Lift Tickets (Trip 1 (penciled in for 2/17))</a>	expense	24 x \$45.00	\$1,080.00
2. <a href="#">Ski/Boots/Poles Rental (Trip 1)</a>	expense	24 x \$15.00	\$360.00
3. <a href="#">Van Rental (Trip 1)</a>	expense	2 x \$189.00	\$378.00
4. <a href="#">Gas (Trip 1)</a>	expense	36 x \$3.25	\$117.00
5. <a href="#">Tolls (Trip 1)</a>	expense	4 x \$37.80	\$151.20

# Important Changes

- The SEF no longer exists – instead there will be a rolling budgeting process overseen by the co-treasurers
- Events relating to History and Heritage Months are eligible to receive funding even if they are not planned by an existing student organization

# Rolling Budgeting

- Any student, affiliated with an organization or not, is able to request funding through the rolling budgeting process
- A form will be available on engage throughout the semester that students are able to fill out to request funding for an event
- All of the same guidelines as regular semester budgeting apply to rolling budgeting except that there is **NO APPEALS** process
- Co-treasurers will review and approve these submissions **weekly**
- An **Allocation Agreement** needs to be signed prior to the disbursement of funds



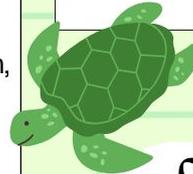
# SECS

## What is SECS?

The Special Events Committee for Students (SECS) hosts campus-wide traditions and events like Snowball, Spring Formal, Hav-A-Friend (HaverMatch), and Self Care Day. Our goal is to promote events open to the whole campus that celebrate and support the diverse Haverford College community. For example, we have aided in or collaborated with events celebrating LGBTQIA+ History Month, the Super Bowl, Halloween, Latinx Heritage Month, and more. Our committee members take an active role brainstorming, organizing events, and being active event assistants. If you want to collaborate, chat about your thrilling ideas, or just need help setting up your event, contact SECS!

## How can SECS help me?

- Planning + Logistics Help
- Event Set-Up + Take-Down
- Directing Towards Resources
- Talking with Faculty/Vendors
- Helping w/ Proposals for \$
- Making Your Ideas a Reality



## Contact:

[hc-secs@haverford.edu](mailto:hc-secs@haverford.edu)

Co-Heads:

Kelly Z. + Abby M.

# Food Policy

- All catering must be emailed to **hc-studentcatering@haverford.edu** AT LEAST 4 WEEKS IN ADVANCE OF EVENT DATE (more if over 100 attendees). Be specific (items, quantities, linens, etc. as you would with any caterer) and calculate your budget based on the menu.
- If Dining Services can't accommodate you, you will receive an email notification that you can work with an outside vendor. **You'll need to get a COI.**
- "Club events where food is essential to the purpose of the event, such as religious or cultural celebrations, can be funded through Students' Council" - *Club Funding and Budgeting Guidelines*
  - *Cuisines that Dining Services cannot provide are eligible for exceptions; email ALIAS with rationale, desired vendor/menu/costs, and COI.*
  - *All other requests must be made to HC Catering first using ALIAS and menu.*
- Food service requires certification
- Food has requirements about refrigeration, not sitting out long before consumption, etc.

# FAQs

- What can I request money for?
- Am I allowed to request an instructor for my club?\*
- What are the guidelines for requesting food?
- How does a club officially become a Bi-Co (or Tri-Co) club?
- What if I don't know what items to request for this round of budgeting?

# Student Engagement!

- We support Students' Council and all student organizations and clubs
- Located in Stokes 022
- Reach us at [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu)
- Follow our IG @[hc\\_engage](https://www.instagram.com/hc_engage)

StuCo **makes decisions** about StuCo funds.

Student Engagement staff **carry out** the purchasing, logistics, and documentation for approved uses of StuCo funds!

You'll work with us to spend your approved allocation, buy the things you need, communicate with campus departments and outside vendors, and any follow-up that is required. We have timelines and policies in place to make this doable.

We also almost always have candy in our office.

# How to Communicate

- **Events:** posted in Engage
- **Contracting** or hires: via email to [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu)
- **ALL purchases:** purchase requests in Engage
- **Catering:** email to [hc-studentcatering@haverford.edu](mailto:hc-studentcatering@haverford.edu)
- Questions: [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu) and copy [hc-treasurers@haverford.edu](mailto:hc-treasurers@haverford.edu) if any approvals are needed

# Event and Purchasing Timelines:

When you are planning an event, you must make sure to submit all requests early enough for items to arrive, contracts to be signed and processed, and staff to be scheduled. To this end:

- **If your event will have 1-30 attendees, you must submit your requests and plans to Student Engagement AT LEAST 2 weeks before the event date.** To ensure your items are ordered promptly and accurately please ensure your orders are placed at least 2 weeks prior to your approved event. The 2 week timeline applies regardless of expected ship times. Orders are not placed on Fridays, so please submit requests before then. Due to the high volume of orders processed, no exceptions are possible. \*\*\*Catering orders must be submitted at least 4 weeks in advance, regardless of event size!
- **If your event will have 31-99 attendees, you must submit your requests and plans to Student Engagement AT LEAST 4 weeks before the event date.** As these events may have additional requirements for insurance and liability, they must be planned at least 4 weeks in advance including email communication with Student Engagement staff.
- **If your event will have 100 or more attendees, you must submit your requests and plans to Student Engagement NO LATER than the end of the second week of the semester in which the event will take place.** These events may have additional requirements for staff support and scheduling of coverage, so they must be planned with enough lead time, or they will need to be scaled down.

Funding access will not be granted if the event is not proposed and requests are not submitted with the appropriate amount of lead time before the event is to take place.

# More about events...

- Spaces need to be reserved in EMS - submitting a request does not guarantee approval/confirmation
- Events are not approved during Finals unless they have a “distress” focus
- Events taking place after 9pm in Founders Great Hall may require a RESE staff presence
- Dates to avoid: Alumni & Family Weekend\*, Plenary 3/24, Haverfest 5/3-4
- Event setup and takedown
  - Include time in your EMS reservation
  - Have people volunteer to do/check setup and clean up after – or ask SECS
- Advertise in Engage - consider use of RSVP function to get idea of attendance
- Share with @hc\_engage for promotion

# Hiring Coaches, Instructors, DJs, Performers, and Speakers

- ONLY CLUB SPORT TEAMS CAN HIRE COACHES. Even volunteer coaches must have background checks and clearances through Human Resources. Jodi and Tyler must know the name of your intended coach and conduct an interview with them before the 4 week+ hiring process can be initiated with HR. **INITIATE THIS PROCESS BEFORE THE END OF THE SEMESTER PRIOR TO INTENDED START DATE.**
- **Students cannot hire anyone or enter into agreements on behalf of the College with anyone.** You may inquire about availability and fee for a particular event. THEN, you forward the communication to [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu) for us to enter into an agreement and begin the payment process. **Students MAY NOT sign contracts.**
- A workshop presenter, speaker, DJ, or performer is not “hired,” but rather paid as an independent contractor. This is a process that requires a contract (if theirs, our Director of Risk Management must review and suggest changes; if ours, our staff will complete it and send it to vendor to sign), an independent contractor checklist, an invoice, and supplier registration through Workday. **INITIATE THIS PROCESS 4 WEEKS IN ADVANCE.** RESE handles all of this.
- You serve as point person, provide maps and parking information, meet vendor on campus, etc.
- Current students **cannot** be hired as paid or volunteer coaches or contractors.

# Submit Purchases via Engage

- Include organization name in all purchase requests
- Indicate the date of the event you are ordering for (if applicable)
- Provide links for all purchase requests
- Make note of all shipping timelines and costs! If your items will arrive too late or are over your budget, Tina will have to follow up with you to provide new options.
- Provide quantity of items needed along with sizes, colors, etc. when applicable
- Submit the purchase request at least TWO weeks prior to the event or intended use (or longer for larger events)
  
- Link to tutorials: [Student Engagement Website](#)

# Making purchases:

You will submit information about each item you want purchased, including a link to the item and any relevant details (quantity, color, etc.) through Engage!

- **Preferred sites: Amazon, Five Below, Target, Walmart (we are tax exempt and have accounts with these stores)**

*Please note:* There is a \$35 minimum on orders from Walmart, Target, and Instacart. Any orders made below the required minimum will not be ordered. Once approved by the Student Co-Treasurers, item order requests may still be denied (albeit rarely) by the Student Engagement Office if they do not meet the College's expenditure requirements. All questions regarding a denied order request must be communicated with the Student Engagement team and we will work with you to determine a solution.

## **Food orders:**

Specialty food orders must be approved by the Auxiliary Services/Catering/Conferences & Events department first. Once approved please schedule a time to meet with the Student Engagement team to make payment from our office. We do not have an Amazon Fresh account. Any requests through Amazon Fresh will be denied.

## **Reallocation of funds / Change of plans:**

If you wish to repurpose funds for any reason, including if a requested item is unavailable or if your plans have changed, you need to obtain written approval from the Co-Treasurers before Student Engagement can make purchases. To get approval, please email both [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu) and [hc-treasurers@haverford.edu](mailto:hc-treasurers@haverford.edu) with the request.

# Tina Coyne, the Peoples' Princess



# Requests from Tina :)

## 1. **Food orders:**

- a. please create a separate purchase request for food orders (ie Instacart)
- b. Specialty food orders/large catering – please schedule a time to come into the office to place the orders yourselves. I will provide payment. This is AFTER you have approval from Mike Boyle.

## 2. **Receipts:**

- a. **ALWAYS GET A RECEIPT!!** – pizza deliveries, pick up orders at whole foods, gas, toll, tickets for travel etc – take photo of receipts and don't delete until it is processed in Engage
  - i. Itemized
  - ii. We are tax exempt
- b. Include receipts in Engage. Please do not send an additional email unless you have permission from our office.
- c. \*Per the controller's office – we will not be able to reimburse for receipts that are over 60 days old. No more submitting all of your receipts at the end of the semester. Please submit as soon as possible, preferably within a week so things aren't forgotten or misplaced.

## 3. **Tina does not make decisions regarding funding.**

4. **Lastly, you will receive an email when your items arrive.** Please pick up your orders within 7 days of receiving your email! We have a very small space. Send a friend if you can't make it in.

# Reimbursement Policy

Reimbursements are **not** permitted, *unless you obtain PRE-APPROVAL from [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu) as soon as your budget is approved, at least 2 weeks prior to a purchase.* Reimbursements create financial risk for students and significant work for staff.

**No advanced approval = no reimbursement.**

- **If you are approved for a reimbursement**, save and submit all receipts (via photo) to be processed in Engage. This includes but not limited to pizza deliveries, pick up orders at whole foods, gas, toll, etc. Receipts do not need to be included in an additional email unless previously requested by the Student Engagement Team.
- Per the Controller's Office, receipts that are over 60 days old will not be eligible for reimbursement. Please submit all receipts promptly within the week of purchase to ensure items can be processed appropriately.
- Per the Controller's Office policies, the guideline tip for a meal is 15% - 20%. Any amount greater than this cannot be reimbursed. Also, if food is picked up, then no tip should be left. If you do tip for pick-up, this cannot be reimbursed.

## REQUIRED STEPS:

- Send an email to [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu) requesting approval for reimbursement at least 2 weeks before intended date of purchase.
- Obtain an itemized receipt containing store information and last 4 digits of card number.
- Submit a funding request on Engage and include all relevant information including clear receipt photos.
- If this is a gas reimbursement, make sure to provide our FLEET confirmation email with the person purchasing gas listed as a driver.
- Assume full financial responsibility for purchases made without pre-approval of reimbursement via email response from [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu) at least 2 weeks before intended purchase.

# Student Engagement is here for you!

We're here for support, but event leads are ultimately responsible for their events. We cannot plan the event nor carry it out on students' behalf (mainly because that would be weird). If you miss deadlines or do not respond in a timely manner to questions, we cannot proceed on your behalf.

We are people with a number of responsibilities supporting a high volume of events and programs. We ask that you communicate respectfully with all staff, from us and Tina to Housekeeping, Dining Services, and Grounds.

Please submit all purchasing questions to [HC-engage@haverford.edu](mailto:HC-engage@haverford.edu). Include [hc-treasurers@haverford.edu](mailto:hc-treasurers@haverford.edu) if approval for reallocation of funds is needed.

For full policies and procedures, please refer to the Student Engagement website:  
<https://www.haverford.edu/student-engagement-leadership>

You are always welcome to reach out to [hc-engage@haverford.edu](mailto:hc-engage@haverford.edu) and/or schedule a meeting with Student Engagement staff to discuss your proposed event, including vendors, spaces and setups, promotion, and purchases. We are here to support you and the work of your organization!



**hc-treasurers@haverford.edu**