

# GSG Finance Policies

(Updated January 2019)

Where these policies conflict, USC policies will take precedence. Any changes to GSG Finance Policies must be approved by the GSG Executive Board and supported by Campus Activities.

Any changes will be communicated directly to GSG Senators, posted on the GSG website, and emailed using the GSG Finance Newsletter. Organizations are responsible for following GSG communication streams for any updates or changes, and for holding Senators responsible for conveying vital information.

***Keep in mind that not all events are guaranteed funding even if they have been funded in the past.*** Policies change over time; only applications for events that adhere to the current GSG Finance Policies will be considered.

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# Definitions

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## Organization Classifications

**Umbrella Organization:** An overarching organization representing the interests of a majority graduate student population within a department or school. Departments and schools elect representatives through Umbrella Organizations who convene at the GSG Senate to discuss issues that impact the entire USC graduate student population, campus environment, and community engagement.

**\*Note:** GSG is revising the current Senate model to better address student representation. By 2019-2020, GSG aims to reduce its Senate to 50 seats with the help of the Senate Restructuring Committee. Contact [gsgvpadm@usc.edu](mailto:gsgvpadm@usc.edu) and [gsgcr@usc.edu](mailto:gsgcr@usc.edu) for more information.

**Sub-Umbrella Organization:** A smaller organization within a school/department with more specific interests. Sub-Umbrellas are organized under their respective Umbrellas, enabling them to access important information through Umbrella Senators.

**Independent Organization:** An organization which is not associated with an individual school/department, and which therefore does not fall directly under an Umbrella Organization (e.g. religious, cultural, common interest organizations).

**Note:** Any new organizations, or organizations not aware of their classification, may contact [gsgfinea@usc.edu](mailto:gsgfinea@usc.edu) for more information. Undergraduate organizations are also welcome to apply for funding for events in which graduate students are included.

## Recognition Status

**Recognized Student Organization (RSO):** status obtained by completing the University Recognition process through Campus Activities. **ALL** organizations must be officially recognized to request funding. Recognition status is reviewed at every Finance Committee meeting.

## Funding Sources

**Discretionary Fund:** The Discretionary Fund is the most flexible for general events benefiting graduate students. Examples include, but are not limited to:

- Workshops and Lectures

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- Trivia Games and Movie Nights
- Welcome Events and Study Breaks

**Tip:** In the event description, provide an agenda/plan for the event. Please describe how your event benefits the general graduate student population and how it will be openly and fairly accessible.

**Joint Fund:** The Joint Fund breaks boundaries by encouraging more collaborative events involving multiple student organizations. This Fund is open to all events organized by two or more organizations with distinctly different graduate student memberships. Joint events with other institutions (e.g. UCLA) are also considered, but are funded based on USC graduate student attendance only. Examples include, but are not limited to:

- Game Nights and Tailgates
- Symposia and Conferences
- Talent Shows

**Tip:** In the event description, provide an agenda/plan for the event with the names of any participating USC or institutional partners. Please describe how you and your co-sponsors are bridging different student populations.

**Volunteer Fund:** The Volunteer Fund inspires, equips, and mobilizes USC graduate students to take action to serve their communities. You can support your community in the following impact areas through service projects:

- Educational (Youth) and Economic Development
- Environmental Conservation
- Emergency Preparedness

**Tip:** In the event description, provide an agenda/plan for the event with the names of any participating USC or community partners. Please describe how your event is rooted in community service and how it provides opportunities for students to make an impact.

**Social Justice Fund:** The Social Justice Fund creates systemic change that leads to equitable access to opportunities and resources through education, holding space, and community organizing. Social justice (or social change) programming works to change conditions in communities that cause systemic problems in the first place. Examples include, but are not limited to:

- Development of Social Justice Leadership
- Partnerships with Key Organizations and Movements

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- Inclusion and Empowerment of Marginalized Communities

**Tip:** In the event description, provide an agenda/plan for the event the names of any participating USC or community-based organization partners. Please describe how your event is rooted in social justice and promotes/advances equity, opportunity, education, or awareness. Include details about how your event empowers and includes marginalized communities.

**Umbrella Fund:** The Umbrella Fund can be used for “closed” events exclusive to the Umbrella Organization’s student population.

Umbrella Organizations have the option to enroll in the **Umbrella Fund Disbursement Program (UFDP)**; through this program, GSG provides pre-approved Umbrella Organizations with their designated Umbrella Funds, via a lump sum disbursement to the advising department at the beginning of the fall semester; this depends upon the department’s ability and willingness to participate.

Sub-Umbrellas and Independents may access this Fund only by requesting an allocation from an appropriate Umbrella for events that significantly benefit its respective student populations.

Examples include, but are not limited to:

- Career Mixers
- Graduation Celebrations
- First Year and Transfer Welcome Events

**Tip:** In the event description, provide an agenda/plan for the event and indicate how the event benefits the Umbrella’s student population. If applying as a Sub-Umbrella or Independent Organization, submit written approval from the Umbrella supporting the use of Umbrella Funds with the funding application.

## Payment Types

**Internal Requisition (IR):** payment process used within USC (e.g. USC Transportation, USC Express Catering, The Lab, USC departments, etc.). IRs are signed by the Director of Campus Activities, scanned and emailed to the applicant. All IRs will be marked as “not to exceed” (NTE), which prevents USC vendors from charging over the approved amount.

**Internal Billing Requisition (IBR):** payment process to USC Facilities Management Services (FMS) ONLY. Payment is electronic, not a physical IR, and must be for the full amount quoted by FMS.

**Purchase Order (PO):** POs are electronic payments for which a PO# is generated in either an email or through fax directly to **approved** vendors in contract with USC. Vendors are managed by the USC Business Office, which may be contacted for more information.

**Procurement Card (P-Card):** Credit card used for Smart and Final purchases, managed by the Finance Interns. P-cards are also used for Amazon purchases, but are directly handled by staff.

## Important Documents

**Umbrella Fund Disbursement Program (UFD) Agreement:** A form to be submitted by Umbrella Organizations which enrolls them into the GSG UFD Program. The UFD agreement must be signed by the second week of the fall semester.

**Intent to Use Form:** A form available on the GSG website for **Umbrella Organizations** to complete expressing the intent to use **Umbrella funds**. This form must be submitted in the beginning of the spring semester or the funds will be forfeit. This form does not apply to other organization classifications or funding sources.

**Calendar of Submission Deadlines:** A resource which provides all application submission deadlines for the fiscal year. The minimum deadline for an application is four weeks, plus time needed for Finance Committee Review; the Calendar takes into account Review days, as well as University holidays and breaks, during which GSG does not operate regularly.

**Funding Application (FA):** An online form to be submitted according to the **Calendar of Submission Deadlines**. It must include amount requested, event description, line items with costs, **vendor quotes**, and additional forms as needed. **Note:** *the Expense Request (ER) has been combined with the BA to increase efficiency.*

**Post-Event Form (PE):** An online form to be submitted **within 5 business days** after an event to document event attendance and success, and to provide all receipts, invoices, and memos. Payments to vendors are **not finalized** until properly formatted final receipts, invoices, and memos are submitted. Once the documents are received, USC has up to 30 days to finalize payments to vendors.

**Vendor Quote:** A formal statement from a vendor to supply goods or services at a specified price within a given period. **A quote must be submitted with the FA for EACH vendor, summarizing the items and expected costs in advance of purchase.**

- **A good quote includes:** the vendor name, quote/invoice#, a payable address for the vendor, phone and email if available. The quote information must be clear and legible. Most vendors, including Express Catering, must be called in order to obtain a formal quote. In the event you cannot obtain a formal quote, include all necessary information in an organized

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excel file and upload as a PDF.

- Sometimes a quote will be issued as an initial Invoice, which should be submitted with the FA as a quote and afterwards submitted as a final Invoice, even if nothing changed. Amounts must be equal to or less than amounts approved by GSG.
- Sometimes a quote will include a **contract, which cannot be signed by students!** In this case, attach the blank contract to the FA; we will have a staff member review and sign the contract.

**Receipt:** Proof of payment listing items purchased, item costs and total cost. Traditional receipts are required for Smart & Final purchases, and purchases made by departments through the UFDP. Funding Application ID# must be written in a visible place. It is recommended that you keep all original receipts, and at minimum take a photo of the receipt immediately when it is issued. Amounts must be equal to or less than amounts approved by GSG

**Invoice:** An itemized bill for goods sold or services provided, containing individual prices, the total charge, and the terms. **An invoice must be submitted according to Purchasing Office criteria for the exact amount requested from GSG or less.**

- ***A good Invoice includes:*** “Invoice” as the heading; invoice#; invoice date; vendor’s name, address, phone#; Payable to USC; your funding application#; your PO#; itemized with a final total. ***An initial invoice may be provided as a quote, but a final invoice is required to finalize payments.***

## Additional Forms

### Due with Funding Application:

**Student Affairs VP Approval Form:** A form to be submitted with the FA for any entertainment related purchases (e.g. USC Ticket Office) and for any speaker gift or prize over \$100.

**Department Approval Memo:** A written letter from the respective department(s) to be provided with the FA for any events taking place during study days and finals weeks, stating that the events will not interfere with students’ ability to study.

### Due with Post-Event Form:

**Prize/Gift Memo:** A form to be submitted **within 5 business days** after an event with recipients’ names and USC student ID#s if available. These must be signed by the recipient(s) to acknowledge

they received the physical prize/gift. An email acknowledgement will suffice if no signatures were acquired the day of the event. We cannot reconcile without this information.

**Transportation Memo:** A form to be submitted **within 5 business days** after an event with attendees' names and student ID#s when applicable, to document passengers for buses.

## Other Terms

**Blue Probationary List:** If receipt(s), invoice(s), speaker gift/prize recipient memo(s), and/or transportation memo(s) are not provided **within 5 business days** after an event takes place, the organization is placed on this list, barring any *immediate* funding.

**Cardinal Probationary List:** if the above mentioned documents are not provided **within 10 business days** after an event, the organization moves to the Cardinal List, prohibiting all funding to that organization **for the semester following the offense** (if listed during spring semester, the organization is barred from funding for the following fall semester).

- **Note:** other offenses found by the GSG Finance Team and/or Executive Board may merit Probation equivalent to the severity and number of offenses.

**Fiscal Year:** a defined 12 month period for budgeting, accounting, and tax purposes. USC's Fiscal Year runs from July 1 to June 30. GSG Funding runs by the same period, so funding is available starting July 1 and ending June 30\*. Funding resets at the start of a new Fiscal Year, so previous Fiscal Year balances are not transferable to the new Fiscal Year balances.

- **\*Note:** Though funds are released to GSG by the University on July 1st, application periods depend upon the status of our online application system, which typically undergoes updates during the summer. Look for posted updates regarding when applications are accepted.

# Application Policies

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## General Policies

1. GSG Funds come from the Programming Fee assessed to graduate students for the academic, social, cultural and recreational enrichment of the student body.
  - a. GSG only distributes RSO Event Funding to student organizations for programming planned and executed by students, for the benefit of the graduate student population.

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- b. GSG can, at its discretion, distribute RSO Event Funding to USC offices that facilitate further distributions of those funds to student organizations.
  - c. If departments or offices supporting graduate students are in need of funding to provide essential programming or services to those students, GSG may consider offering financial support. In this case, direct communication with GSG would be required, as the application process is reserved for student organizations.
2. All student organizations applying for funding **MUST** be official RSOs. Refer to Campus Activities for Recognition requirements.
3. All RSOs **MUST** have one primary contact email for general communication and continuity.
4. All RSOs **MUST** follow GSG and University policies.
  - a. Students **CANNOT** sign contracts with vendors.
  - b. GSG reserves the right to attend/audit any event funded by GSG.
  - c. Penalties including but not limited to probation of current and future funding, will be issued in respect to severity and repetition of offenses.
  - d. Campus Activities may issue its own penalties in respect to the severity and repetition of offenses.
5. All individual applicants **MUST** complete the Finance Orientation to apply for funding.
  - a. The orientation is updated annually and must be completed each year.
  - b. The orientation outlines the applicant's responsibilities. The applicant signs in acknowledgement of said responsibilities, and agrees to adhere to all GSG and University policies. Responsibilities include but are not limited to submitting all required forms in completion and within deadlines.
6. Applicants will exercise professional communication and use discretion when contacting GSG and Campus Activities officials.
  - a. First contact the appropriate director before including any higher officers or staff members. If an applicant experiences any difficulty with a particular director, the applicant may contact the GSG Vice President of Administration.
  - b. Time-sensitive topics may be labelled as "URGENT" in the subject line, **but only if absolutely necessary**.
  - c. *GSG reserves the right to suspend an individual applicant from applying for funding if the applicant inappropriately contacts GSG, is non-communicative, or does not adhere to the responsibilities of the applicant as defined in our policies and orientation. This does **NOT** penalize the RSO, only the individual.*
7. All general funding sources are first come, first served.
  - a. Only 50% of each funding source will be available per semester to ensure more equal distribution between fall and spring events.
  - b. Fall Application Period runs August-October and the Spring Application period runs October-April.
8. Umbrella Funds are reserved for Umbrella Organizations as the representative bodies of broad student populations.
  - a. Umbrella Organization Senators **MUST** attend all Senate Meetings or provide a proxy when needed. Umbrella Organizations will receive a warning if a Senator is not fulfilling their duties, and Umbrella Funding may be withheld due to multiple offenses.
  - b. Umbrellas must provide an annual budget for use of Umbrella Funds and publish policies for access to Umbrella Funds by other RSOs.



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- i. The budget should provide basic information on which organizations are expected to be funded, what may be funded, when something may be funded, how much may be funded.
    - ii. The policies should detail types of events considered, allocation amounts, and the process by which RSOs may appeal.
  - c. Umbrellas have the option of enrolling in the UFDP.
    - i. Umbrella leadership and responsible administrator(s) must sign agreement and adhere to GSG policy.
    - ii. Umbrellas receive 80% of the calculated funds in the fall, and the remaining 20% in spring with submission of the Intent to Use form.
    - iii. Umbrellas must provide fall and spring semester reports by the last day of each semester.
    - iv. Umbrellas must provide a final report by July 5 with all final amounts and receipts. Re-enrollment into the UFDP is contingent upon this report.
  - d. Sub-umbrella and Independent Organizations may appeal to Umbrellas for Umbrella Funds; Umbrellas can use their discretion to approve or reject these appeals based on the merit of an event and impact on their respective student populations.
    - i. Sub-umbrella and Independent Organizations approved for Umbrella Funds must apply directly to GSG and provide written approval in the FA.
    - ii. If the Umbrella is enrolled in the UFDP, the Funds are distributed directly by the Umbrella's advising department and must be included in UFDP reports.
- 9. Events funded by GSG **MUST**:
  - a. Be "open" to ALL graduate students;\*
    - i. If an event requires an entrance or additional fee, said fee cannot bar graduate students from accessing the items or services funded by GSG. This also applies to venue space.
    - ii. If RSVP is required or space is limited, all students must be able to equally access the method of RSVPing or accessing the event.
    - iii. In no case should there be evidence of an application or selection process to gain access to an "open" event.
    - iv. Graduate students should be able to benefit from or participate in any "open" event.
      - 1. If an event is contingent upon a specialized skill, the event may not be evaluated as an "open" event, because not all graduate students can equally participate or benefit from the event.
        - a. e.g. Law pro-bono services to the community; Chemistry demo-day; Health Fairs with health care services
      - 2. Applicants are encouraged to outline benefits and participation roles for graduate students to emphasize accessibility
      - 3. If the event is not related to an academic requirement, but is too specialized for the general funding sources, Umbrella funds may be an option.
  - b. Be advertised through GSG;
  - c. Have the GSG logo on all promotional materials;

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- d. Abide by Appropriate Use and Allocation Rules defined below;
- e. Be hosted on campus or in a public space (no private residences);
- f. Be hosted according to the details approved by the Finance Committee in the funding application.

\*Note: Umbrella Funds may be used for “closed” events which are exclusive to related student populations. These do not need to be publicly advertised, but are still expected to be accessible to the related student populations.

## Application Process and Deadlines

1. Interested applicants must fully complete the application process within the required deadlines to be eligible for funding.
  - a. There are two application periods, for the Fall and Spring Semesters. The Fall Application Period runs August-October, and the Spring Application Period runs October-April. This prevents overuse of funding within a single semester.
  - b. The process consists of an initial Funding Application phase, followed by the Approval Phase and Processing Phase, and lastly the Reconciling Phase.
  - c. Applications are accepted through the online portal, Pluto, only.
  - d. Applications must be submitted prior to the Finance Committee review session that is four weeks in advance of the event date; use the **Calendar of Submission Deadlines** to determine when to submit your application based on your event date.
  - e. If a funding source is exhausted, GSG will announce the fund is closed until further notice and will no longer accept applications for that funding source. Closed funds may reopen if additional funding becomes available.
2. Funding may be used for summer events taking place through June 30th.
  - a. Funding Applications must be submitted during the Spring Application Period.
  - b. Post Event Forms must be submitted within 5 days of the event.
  - c. Events that take place after June 30th occur in the new fiscal year. Currently, GSG funding for events taking place between June 30th and the first day of the fall semester is **not** available.
3. Study Days, Finals, Breaks and University Holidays:
  - a. GSG does not hold normal office hours during these periods;
  - b. Applications for any events that take place during study days and finals must include a Department Approval Memo which states that the event will not affect students' ability to study and take exams.
4. Additional deadlines for Umbrellas:
  - a. Provide annual budget by the second week of fall semester;
  - b. Submit Intent to Use Form by second week of spring semester;
    - i. If no Intent to Use Form is submitted, the remaining funds will be reallocated to other areas of the GSG budget for full utilization.

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- c. UFDP deadlines:
  - i. Enroll by second week of fall semester;
  - ii. Provide fall report by last day of fall classes;
  - iii. Provide spring report by last day of spring classes;
  - iv. Provide final report with receipts/invoices by July 5th.
- 5. Deadlines are absolute, based on time required for the Finance Directors, Finance Committee, and Finance Interns to review applications, to correct for errors, and/or to provide additional information that the USC Business Office requests.
- 6. ***If an organization fails to adhere to deadlines or application requirements, GSG is not responsible for premature or personal payments by the organization to vendors. GSG does not honor reimbursements or cover late fees, cancellation fees, or overages.***

## The Application and Approval Phase

- 7. **ONE** Funding Application is required **PER EVENT** according to the ***Calendar of Submission Deadlines***:
- 8. Provide basic contact and event information as outline in the application.
- 9. Provide a description of the event with fundamental details and why you believe your event merits funding from GSG. Be sure to mention:
  - a. Any requirements for attendance (e.g. RSVP);
  - b. Target audience(s);
  - c. Co-sponsors or partnerships;
  - d. Benefit(s) to graduate students.
- 10. Request an appropriate funding source.
  - a. Make sure that your event is appropriate for the type of funding you are requesting. Refer to the definitions for assistance.
  - b. **ONLY ONE** RSO should submit per joint event. The applicant will assign co-sponsors to their respective expenses in the application if those co-sponsors are also requesting Joint Funds.
- 11. Request funding for appropriate line items. Abide by:
  - a. Rules outlined in Appropriate Use of Funds;
  - b. Allocation rules;
  - c. Internal USC vendors and approved external vendors **ONLY**;
    - i. Approved vendors **MUST** be confirmed before use. Call to confirm the vendor still accepts POs from USC. GSG is not responsible for vendor contracts and cannot guarantee approved vendors for use.
- 12. Provide a quote for each Vendor.
  - a. Quotes must be formatted with all criteria listed above.
  - b. Contact vendors by phone or email to obtain formal quotes.
  - c. Some vendors do not need formal quotes, but require PDF/Excel documents or cart screenshots with anticipated expenses:

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- i. USC Bookstore;
    - ii. Amazon;
    - iii. Oriental Trading;
    - iv. Dining In (The Lab, Tommy's Place, etc.).
  - d. Quotes must be equal to or less than the amount approved for that vendor in the funding application.
  - e. Provide the contact information for the correct vendor location.
13. Provide additional paperwork as needed with the FA:
- a. Flyer for advertising that contains the GSG logo and pertinent information, including names of any expected speakers or honorable guests;
  - b. VP Approval Form (for events with admission costs, items over \$100);
  - c. Contracts (for any vendor requiring a contract) - explicitly ask your vendor if they have a contract for your event request;
  - d. Department Approval Memo - for any events taking place during study days and/or finals.
14. Only the payment types as outlined above are considered.
- a. An organization may apply for an Open IR, which pertains to events that take place over multiple dates (recurring meetings, symposia, etc.). Applications should reflect the number of events and dates.
15. Once per week, the Finance Committee reviews applications.
- a. Expect a decision within one week after submission.
  - b. Applications may be brought before the GSG Executive Board if additional review is required.
16. At the discretion of the Finance Committee, an applicant may be allowed to revise an application if only minor changes are required for acceptance. A deadline will be provided if this option is offered to an applicant.
17. An organization with a rejected application may re-submit a revised application or request to present its case. The request must be submitted to the Director of Approvals **within 5 business days** from the time the organization is informed of the rejection.
18. Once an application is approved, it is expected that the event will run according to those details provided in the application and approved by the Committee.
- a. Any changes to an application must be approved.
  - b. If changes are not approved, GSG is **not** responsible for payment to vendors.

## The Processing Phase

- 19. Finance Interns process payments to vendors.
- 20. Applicants will be notified when payment information is available:
  - a. PO numbers in Pluto to place orders with vendors;
  - b. Scanned IRs in Pluto to place orders with vendors;
  - c. IBRs are automatically sent to FMS.
- 21. Applicants are responsible for any item pickups.

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- a. Amazon, Office Depot, Oriental Trading, Manhattan Stitching and similar approved vendor pickups are in SKS 410 (UPC).
22. Smart and Final appointments must be scheduled with Finance Interns **7 business days in advance** with reference to the Student Organization, Funding Application ID#.
- i. Appointments are only available during specific time blocks and will vary by semester according to interns' schedules. Email [uscgsgfin@gmail.com](mailto:uscgsgfin@gmail.com) for availability.
  - ii. The time of the appointment is for checkout, not shopping. A Finance Intern (with name badge) will be waiting at checkout.
  - iii. Interns will not allow overspending or inappropriate purchases.
  - iv. The responsible party for the RSO must come prepared with the application number and quote, and must stay within the approved budget.
  - v. The responsible party for the RSO is expected to be prepared to transport the items. GSG does not provide means of transportation or storage.
  - vi. A 15 minute grace period is observed if the responsible party is late before the appointment is considered as missed.
  - vii. Missed appointments will result in forfeit of the approved funding. Multiple offenses may result in probation.
23. If issues arise due to difficulties with venue space, guest commitments, travel, or vendor cooperation, GSG will accommodate for these issues without penalty.
- a. Changes to approved application details must be:
    - i. In response to uncontrollable, unavoidable circumstances
    - ii. Clearly and immediately communicated to GSG and respective RSO(s)
    - iii. Limited to date, vendor and payment options
  - b. If GSG assess a situation as preventable by the RSO, accommodations may be made with penalties incurred due to lack of responsibility.
  - c. If accommodations cannot be made or if an RSO decides not to move forward with an event, the FA related to the event in question may be cancelled:
    - i. The RSO must not have placed orders with any vendors
    - ii. Contracts must not prevent cancellation of payments

## The Reconciling Phase

24. Post-event forms are due **within 5 business days after the event**:
- a. One per application
  - b. If all required information is not provided within the deadline, the organization will be placed on the **Blue Probationary List**.
  - c. Failure to turn in required documents **within 10 business days** will put the organization on the **Cardinal Probationary List**.
  - d. Speaker gifts in the form of e-gift cards issued after the event may delay this process and will not count against the applicant.
    - i. After the event, the names and emails of the speakers who were able to attend should be submitted in a comment on the application in Pluto.

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- ii. A Finance Intern will issue the Amazon e-gift card electronically to the speakers and will upload the final invoice.
    - iii. Once this final expense is processed, the applicant will be able to move forward with post-event materials.
  - e. Contact [gsgfindr@usc.edu](mailto:gsgfindr@usc.edu) with any concerns if these deadlines cannot be met for any reason.
25. Photo(s) of the event are required.
26. Final invoices/receipts must be formatted as defined above. Any final amounts that exceed the amount approved by GSG will be **rejected**. Final payments **MUST** be **equal to or less than** the amount approved by GSG.
- a. Final invoices/receipts are **not** required to be submitted by the applicant for some vendors, as these are provided internally:
    - i. FMS;
    - ii. Amazon;
    - iii. Oriental Trading;
    - iv. Office Depot;
    - v. Smart & Final.
27. Memos
- a. Prize/Gift memos for physical items:
    - i. Must include names of recipients, student ID#s when applicable, signatures of recipients;
    - ii. Gift memos for speaker gifts must include the full name of the speaker and the speaker's signature;
    - iii. Email acknowledgements are accepted at minimum for reconciling purposes.
  - b. Transportation Memos must include names of passengers and student ID#s when applicable.
28. A revision process may take place to meet all post-event requirements.
29. The Director of Disbursements and Reconciling will approve the final version of the post-event form and submit all final invoices/receipts to Accounts Payable.
- a. USC has up to 30 days to pay vendors upon receipt.

## Appropriate Use of Funds and Allocation Policies

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- 1. RSO Event Funds may be used for:
  - a. Food;
  - b. Venue space;
  - c. Promotional items (printing, buttons, t-shirts, etc.) for special events:
    - i. Event must significantly impact USC students and/or community members (e.g. general meetings/events do not qualify);

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- ii. All promotional items, including t-shirts, must include the GSG logo;
    - iii. Designs must be approved by the USC Office of Trademarks & Licensing Services (TLS);
    - iv. Necessity/benefit of promotional items must be clearly indicated.
  - d. Prizes;
  - e. Speaker Gifts (No fees, but may be Amazon e-gift card or physical item);
  - f. Event Services (security, FMS, TES, entertainment, etc.);
  - g. Transportation (buses, parking);
  - h. Disposable/perishable supplies (tablecloths, flowers, art supplies, etc).
2. No RSO Event Funds may be used for:
- a. Conference travel or registration (see our Travel Grants Program);
  - b. Other transportation (flights, Uber/Lyft, Metro, etc.);
  - c. Hotel Accommodations;
  - d. Retreats (e.g. overnight events that are intended for a training and bonding among outgoing and incoming student organization leadership)
  - e. Refundable Deposits;
  - f. Speaker Fees;
  - g. School-related Supplies (e.g. ink, laptops, etc.);\*
  - h. Unapproved Permanent Items (e.g. graduation gifts, equipment, etc.);
  - i. "Closed" executive meetings;
  - j. Department-run events or department expenses;\*
  - k. Alcohol.
3. Amazon:
- a. Due to unforeseen difficulties this year, use of Amazon has been restricted to e-gift cards for speaker appreciation gifts and to specialty items only;
  - b. For speaker gifts:
    - i. Any gift cards for appreciation gifts must be given in equal amounts. A single person may not be a recipient of two or more gift cards;
    - ii. E-gift cards will be issued after the event.
  - c. For specialty items:
    - i. The item must be available using Prime shipping;
    - ii. Items are subject to a comparable substitution (e.g. the nature of the item is similar but the color may not be exact, the size of the item may change, etc.);
    - iii. If an item is unavailable at the time of the purchase GSG will contact the applicant to discuss alternative options;
    - iv. Orders will be placed 1-2 weeks out from the event date;
    - v. Students will be notified through the funding application system (Pluto) when orders are placed, expected to arrive, and available for pick up.
4. Academic Programming\*
- a. RSO Event Funds can be used for student-run academic programming such as speaker panels, career networking, and workshops.
  - b. We do not fund "school-related supplies," which may sound like only basic supplies like paper and ink, but also includes any supplies related to academic requirements:
    - i. e.g. Strings for Music RSOs;
    - ii. e.g. Medical supplies for Health Science RSOs;
    - iii. e.g. Software for Computer Science RSOs

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- c. We do not fund department events or expenses, which are expected to be managed by a department or school. GSG Funds support events hosted by students, for students, and are not intended to supplement department funding.
  - i. e.g. Department speaker series
  - ii. e.g. Department supplies or equipment
- 5. Alternative Breaks
  - a. We currently do not support applications for Alternative Breaks with RSO Event Funds due to the unique nature of related expenses.
  - b. GSG is offering financial support to the Campus Activities' [Alternative Breaks \(AB\) Program](#), which is directly managed by their office staff.

## General Funding Allocations

1. Half of the GSG budget for each Funding Source is reserved per semester to prevent overuse during a single semester; all available funding is **first come, first served** during each semester (does not apply to Umbrella Funds).
  - a. Funding Sources will close and reopen as appropriate, according to the available budget each semester.
2. The Finance Committee will only consider the expected number of program **fee-paying graduate student attendees** when allocating funds.
  - i. The only exceptions are for the Volunteer and Social Justice Funds, which fund non-graduate students for **half** of any set allocation (e.g. if funding \$16 per graduate student for dinner, \$8 would be allowable for non-graduate students).
3. An organization can receive a maximum amount of \$2,500 **PER SEMESTER** from **EACH** funding source (**not** Umbrella Funds).
  - a. An organization **cannot** reallocate funds from one semester to the other (e.g. use the \$2500 from fall towards the spring semester for an event worth \$5000), unless the Director of Finance – Approvals receives notification at the start of the fall semester that such reallocation is necessary for large-scale events. This prevents overuse of funding sources during any one semester.
  - b. An organization **cannot** reallocate funds within an approved application or between approved applications.
4. Umbrella Funds are directly available to Umbrella Organizations **ONLY** at \$16 per enrolled student per year for the respective degree programs they represent (numbers are based on previous year's enrollment for convenience).
  - a. Only 80% of the total Umbrella budget per Umbrella is available in the fall; the remaining 20% will be available in the spring if the Umbrella is in good standing.
  - b. Umbrella Organizations may allocate Umbrella Funds at their discretion to Sub-umbrellas and Independent organizations . Umbrellas are expected to provide programming directly, as well as allocate to requesting organizations as appropriate.
5. GSG Finance expects organizations to track their own funding responsibly throughout the year. Organizations can request their balances from the Directors of Finance - Approvals, but will only receive notification directly from GSG Finance once balances have been maxed.



## Item-Specific Allocations

1. **Meal Allocation Maximums:**
  - a. Breakfast (8am – 11am): \$8/person
  - b. Lunch (11am – 4pm): \$16/person
  - c. Dinner (4pm – 8pm): \$16/person
  - d. Snacks (e.g. Coffee/Tea/Pastries): \$5/person
  - e. Multiple meals may be requested for events that extend across mealtimes (e.g. symposium runs from 9am-4pm, may request breakfast and lunch)
  - f. Snacks may be requested in addition to a meal.
2. **Promotional Item Maximums:**
  - a. T-shirts: \$10 per shirt (accounts for fees and shipping)
  - b. Printing: \$50 per event
  - c. Other: \$5 per person
    - i. Pens, mugs, etc.
3. **Prize Allocation Maximums:**
  - a. \$150 per event
    - i. Any one prize over \$100 requires a VP Approval Memo
4. **Speaker Gift Allocation Maximums:**
  - a. \$1000 cap per year for speaker gifts
    - i. Must be an Amazon e-gift card or physical gift from internal or approved vendors.
    - ii. Cannot be more than \$100 in value per person.
5. **Supplies Maximums:**
  - a. Must be perishable (usable for a single event, not retained by organization)
  - b. No more than \$5 per person
6. **Transportation Maximums:**
  - a. Buses: \$25 per person
    - i. Bus cost should reflect number of passengers; if application numbers and final numbers differ greatly, but the cost of transportation was not adjusted to reflect the final number of passengers, GSG is responsible for **ONLY** the cost to support the final number of passengers.
  - b. USC Parking passes: \$300 per event
7. **Venue and Service Maximums:**
  - a. \$20 per person
  - b. Vendor packages for space/food/services may be considered at higher allocations.
8. All defined allocations are subject to evaluation. The overall cost of the event, if multiple funding sources or line items are requested, is taken into consideration to prevent overfunding. **A simple “rule of thumb” to follow is to request funding for no more than \$30 per person per event in accumulative costs.**
9. Approval of requested items and vendors is at the discretion of the Finance Committee members who represent various student populations and backgrounds.
10. **All additional charges (tax, tip, service charge, etc.) must be included in the budget. GSG is not responsible for overages or late fees.**