

## 2021-2022 CALENDAR YEAR BUDGET NOTES

Adopted by the 2020-2021 IFC

### 1. Student Involvement in Budgeting Process

Since Incidental Fees are paid by students, the areas funded (Abby's House/Food Pantry, ASWOU, Access, Athletics, Campus Recreation, Child Care, Creative Arts, Student Engagement, Student Media, Student Activities Board, WOLF Ride), should be able to document student involvement in the budgeting process. Increase the outreach to students via Social Media throughout the whole IFC process.

### 2. IFC Decisions when Committee is not in Session

In the event that a decision must be made by/for the IFC when the committee is not formed or in session, all decisions deemed necessary by these Bylaws or the IFC Budget Notes shall fall to a special committee of the three (3) elected IFC members. If there are not three (3) elected IFC members, the ASWOU President shall appoint the remaining members. These three (3) members shall elect from within themselves a chair for this committee. Any of the three elected IFC members may call this special committee to order should they deem it necessary. The ASWOU President shall be present to represent the student body at-large. The ASWOU Senate President shall be present as the IFC Parliamentarian. The IFC Advisors may be present to provide budget notes and any other relevant information. Non-Voting members of the IFC may be called upon to provide any relevant information. Any decisions must be passed by a simple majority vote of the three (3) elected IFC members. The chair of the special committee will report on any decisions made to the full IFC once in session. Decisions should be rendered within two weeks after receipt of request.

### 3. Right to Information

The committee shall have access through the Area Heads of IFC funded areas (Director of Abby's House/Food Pantry, Athletics Director, Campus Recreation Director, Child Care Center Director, Creative Arts Division Representative, Director of the Office of Disability Services, Director of Student Engagement, Student Media Advisor, the ASWOU Director of Business and Finance, Coordinator of WOLF Ride, as well as the Vice President of Finance and Administration, the Vice President of Student Affairs, the Controller) to all information, including but not limited to Cut/Plus Packages, student and

staff FTE Status before changes are made to allocated FTE, effect of each cut/addition to their area of responsibility , written or otherwise, required to fulfill its purpose. Refer to the Bylaws Article IV, Section p. for more information on what is included in Budgets.

#### 4. Noncompliance with Budget Notes & IFC Guidelines

In the event that an area or the committee does not comply with a budget note or IFC guideline established by the Incidental Fee Committee the issue will be placed on the next agenda. If the Area Head refuses to provide the information (Budgets, FTE, Cut Package, Plus Package, etc.) by the Preliminary Decisions the committee will not provide a preliminary allocations but will present the area's budget with a minimum of 20% cut to the student body. If the information is not provided by Final Allocation then the cut will hold and a greater cut could be issued at the IFC's discretion. Students will be informed during the Open Hearings that the consequence for budget cut is due to Area Head's refusal to provide budget information.

#### 5. Adversarial Attitudes

The committee should recognize that adversarial attitudes between areas are not conducive to formulating logical, reasoned decisions. The committee frowns heavily upon areas that resort to measures of antagonism to further their cause. The committee understands that areas should not use their positions to harm/discuss other area's budgets, especially in a public format.

#### 6. Students on IFC Sub-Committees

All budgetary sub-committees for IFC funded areas should have at least two IFC Members, one ASWOU Senator appointed by the ASWOU Senate President and may have at least one student at large (non-committee) appointed by the IFC Chair or the Sub-Committee Chair. Students are welcome to attend subcommittee meetings. Prior to subcommittee meetings the IFC Chair assigns IFC members to the subcommittees. The IFC Chair should not be assigned to a subcommittee, but will debrief with each subcommittee. Advisors may be invited to subcommittee meetings but their attendance is not required to hold a meeting. The IFC Chair should provide IFC members with questionnaires prior to the subcommittee meeting. Each sub-committee should hold at least one meeting in accordance with the IFC checklist, and continue to meet as needed.

## 7. Student Opinions

The committee should search out a wide variety of student opinions before making a decision. It is recommended that a forum be provided for this purpose as early as possible, such as open hearings and tabling. It is recommended that the open hearings not be the only student opinions used in the decision making process and that all other student opinions are accepted. The use of Google Forms, all-student emails, and WOU Student Media are suggested to gather additional opinions. IFC members should document student names and opinions obtained outside of the open hearings and report them at IFC meetings. All efforts should be made to obtain opinions related to both the academic year fee and the summer term fee.

- The Athletics sub-committee is also the Media sub-committee and is responsible for notifying students of opinion-gathering events.
- Office of Disability Services should be notified as soon as possible of Open Hearings and request an interpreter for the hearings.
- IFC Open Hearings, tabling, and other forms of opinion-gathering should be limited to student opinions.
- IFC Members should make every effort to educate and inform students on the IFC process and the benefits and consequences of IFC's actions.
- IFC Members are expected to staff an informational table in the time between Preliminary Decision and Final Decision. Each IFC Member should staff the table at least 2 hours.

## 8. Budget Review and Submittal Dates

The areas funded by IFC, as defined in the IFC Bylaws, will be notified one month prior to the presentation materials submittal date.

Area heads must meet with their IFC sub-committee at least once before submitting their budget.

Budgets that are submitted after the submittal date shall have their base budget request reduced by 2%. Penalties may be appealed after a case-by-case review by committee members.

## 9. IFC Funded Salaries and Position Evaluations

Any increase in IFC budget requests which fund salaries, other than cost of living increases, must be available for the committee to review upon request.

The IFC shall in the relevant sub-committee, review the salary and position descriptions of every newly requested IFC funded position. When a department is requesting a new salary, IFC should take into consideration future salary/OPE increases that they will not be able to control.

If an area makes changes to position descriptions, those changes must be reported to the committee.

#### 10. Per Diem (Food Lodging)

When budgeting for lodging and food for group travel, the IFC will abide by University Policy in regards to setting per diem rates per fiscal year.

#### 11. Supplemental Revenues and Purchasing

It is strongly encouraged that all funded areas explore supplemental revenues outside of the Student Incidental Fees. It is also strongly encouraged that IFC funded areas accept the lowest bid from a responsible vendor when making purchases.

#### 12. Extraordinary Travel Fund

A fund to provide extraordinary travel monies for the IFC funded areas should be set aside in a rollover reserve account. No direct charges may be made to these travel funds. Once allocations have been approved by the Travel Subcommittee, fund transfers will be made by journal voucher to the appropriate operating accounts. Allocated funds shall be used to pay for travel, registration, food, and lodging only. Funds should not be used for personal internships and/or study abroad programs. It is highly recommended not to allow or accept travel requests until the Travel Sub-Committee has been established. IFC Chair will explain extraordinary travel committee responsibilities prior to members being assigned. Some attempt should be made to evenly distribute funds to each area represented by the committee and proportionally over the three terms, without bias (see travel fund procedures).

#### 13. IFC Extraordinary Travel Response Form

The IFC Extraordinary Travel Response Form is a mandatory requirement after receiving extraordinary travel fund monies from IFC. Extraordinary Travel Response Forms are to be returned within 2 weeks of the students' return from travel. Should the

aforementioned form not be returned, the IFC has the right to freeze any remaining or future extraordinary travel funds to that organization.

#### 14. IFC Reserve

It is recommended that every effort be made to maintain a 10 % reserve of that current year's base budget. Every effort will be made to replenish the account up to the 10 % level before any further allocations are made.

#### 15. Changes in Base Budget Funding

Increases in base budgets for a given area does not require or compel IFC to increase funding for that area. It is up to the departments to allocate based on funds provided by the committee.

IFC will determine funding for each area recognizing that available funds may be limited by:

- Enrollment projections
- Required IFC reserves of 10%
- Negotiated salary and other payroll expense increases
- Required utility increases
- Consideration of current Incidental Fee rates as compared to peer institutions
- The affordability of the fee for students attending Western Oregon University

#### 16. IFC Operational Expenses

The IFC operational expenses will be budgeted and paid for by ASWOU for each academic year including the stipend for the IFC Chair, publicity, copies, and supplies.

#### 17. Recording

It is recommended that all IFC meetings be recorded and stored in a secure location, under supervision of the IFC Chair and the IFC Secretary. Recordings will be retained in accordance with the institution's record retention policy. Following the IFC final decision, the recordings for any yet unapproved minutes shall be made available to the ASWOU Senate.

## 18. Child Care

The area of Child Care is funded to an IFC reserve account. The committee will review the manner in which these reserve funds are distributed each year. The funding formula used by the 2018-2019 IFC for the 2019-2020 academic year was as follows: 19 FTE students x 3 terms x 42.75 percent, which provided a 42.75% discount to student parents. These figures should be recalculated each year based upon program usage and environment. *The sole purpose of these funds is to give student parents a subsidized child care rate.*

## 19. Over-Realized Funds

Over-realized funds will be distributed at the discretion of the IFC for one-time expenditures.

## 20. Enhancement Request Forms

The WOU Budget Office will create and maintain standardized Enhancement Request forms. Enhancement Request forms shall be distributed to areas no later than the first day of the academic year (barring extenuating circumstances). In addition to the standardized format, Enhancement Request forms will include all sources of funding support for the enhancement (general funds, other auxiliaries, etc.).

- Enhancement Request forms shall include the following:
  - Alternative options that the department is considering (i.e. Engage vs. Google® Groups).
  - Breakdown of where the funds are to be spent.
- Enhancement forms should be separated from base budgets.
- Request includes itemized detail request on what enhancement is for each index.

## 21. Computer Replacement Fund

A fund to provide replacement computers for IFC funded areas shall be set aside. Computers in IFC areas will be replaced on a priority basis with failed machines replaced first followed by oldest machines on inventory maintained by University Computing Services (UCS). The replacement process will follow the UCS computer replacement policy. Areas wishing to purchase computers/software outside of the UCS base configuration will be required to fund the difference from their existing

funds. Request UCS to provide an updated inventory list of IFC funded computers which shows where computers are located and when/what year computers will be eligible for replacement. The IFC Chair invites a UCS representative to the IFC meeting to provide the IFC with information about the computer replacement process.