Student Affairs Working Procedure on Staff Morale Allocations Funded by State or Foundation Funds

Intent: To streamline the process for allocating staff morale funds to the different areas within Student Affairs.

Background: Each fiscal year (FY), the University President approves funding for morale money to be allocated to each division. The Budget & Planning office prepares a memo to notify division vice presidents of their one-time allocation of funds to be spent from Fund TM955. The notification includes carry forward from the previous year. All allocations are calculated based upon the number of full-time equivalent (FTE) general fund employees in each division. Currently, the funds are derived from the University’s auxiliary enterprise assessment of 1%. From the 1% assessment, 6% is allocated to Student Affairs. This allocation was agreed to by the current Cabinet members. The funds are usually transferred directly to “unallocated” TM955-510. The allocation is not guaranteed and may vary each year.

In addition to the auxiliary enterprise assessment, the Division of Student Affairs (DSA) has a Foundation account which includes funds donated to Student Affairs. This Foundation account has limited restrictions. This Student Affairs fund can be accessed for staff morale purposes if deemed appropriate by the Vice President for Student Affairs (VPSA).

Accountability: The VPSA, DSA Area Heads

Applicability: All areas of the Division of Student Affairs

Definition(s):

Attachment(s):

Procedure: The AVP for Assessment and Strategic Operations (ASO) and the Budget and Operations Analyst will consult with the VPSA for approval of the staff morale allocation to the different areas based on the total TM955 allocation for the year. Funding shall first be allocated to division priorities and any remaining funds shall be allocated to the areas. Division priorities include but are not limited to: funds for the VP’s discretion, Celebration of Excellence, DSA trainings, student assistant trainings and celebration, and activities coordinated by the CI-U (Connect Initiate Unite) Team. A minimum of $1,000 shall remain in the TM955 fund each year for reserves and allocations should not exceed the amount received from the University Budget & Planning office.
An allocation from the Student Affairs Foundation fund may be distributed if the TM955 funds have been fully allocated for division priorities first. The total morale allocation from the Foundation shall not exceed the revenue collected from the previous year.

A dollar amount per FTE will be allocated to all areas within the division with the exception of Housing and Residential Education (HRE). Funds will not be allocated to HRE at this time as their funding has been ample, less restrictive, and can be used for staff morale purposes.

If the staff morale allocation for the areas comes from Fund TM955, areas shall expense from the accounting string XXXXXX (account code)-TM955-510. Any unspent allocations at the end of the FY will not remain with the areas and will remain in the division morale pool to be reallocated during the next FY. If the staff morale allocation for the areas comes from the Foundation fund, the areas will expense directly from the Foundation accounting string XXXXXX (account code)-50010-450. Any unspent Foundation funds will not remain with the areas and will remain in the Foundation fund for future spending, to be determined by the VPSA. The appropriate accounting forms should be completed and must be signed by the area AVP and the AVP for ASO prior to being sent to Financial Services for processing. Each area AVP will be responsible for expenses that exceed their allocation and the funding will have to come from another funding source.

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**Me**  
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4/7/15  
Date

**Approved:**

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