



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Organizational Budget Orientation

Spring 2026

Undergraduate Student Government

January 3 & 4, 2026

STUDENT GOVERNMENT

Introductions



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OVERVIEW

What is the USG Funding Process?

- The Senate appropriates the Undergraduate portion of the Student Organizations Fee, \$27.49 per student per year.
- The Senate conducts this process based on the Undergraduate Financial Regulations, compiled as Title VI of the Undergraduate General Statutes.
- Any majority-Undergraduate registered student organization is eligible to apply for funding.
- To participate in the USG funding process, you **must** review and thoroughly understand Title VI. This will be tested for in the Undergraduate Treasurer's Test.

Requests

The first step of the funding process is to draft your organization's funding request and to submit it to the Senate. This step is managed by the Finance Committee and its Chair.



Hearings

The second step of the funding process is to defend your request to the Finance Committee. Committee members will have questions for you to answer about your application which will allow them to generate recommendations to be heard in the full Senate.



Spending

The final step is to carry out your activities and then to request expenditure. This is handled directly through the Student Controller, carried out by CUSO, and overseen by the Undergraduate Treasurer.

OVERVIEW

Funding Criteria



- **Representation**

Consider the number of students affected and involved in the project. Anticipate representation by examining past involvement, enthusiasm, and anticipated engagement.



- **Vitality**

Evaluate the program's importance to the organization. Assess its priority among other sponsored programs, fundraising aspects, and impact on organization morale.



- **Specialization**

Examine the uniqueness of the program to the Undergraduate Student Body. Consider cultural/educational value, overlaps with other campus programs, recognition brought to the University, and association with the organization.

STEP ONE: REQUESTS

Budget Submissions

- Organizations must submit the Budget Request Form and explanation at <https://congress-finance.unc.edu/appropriations/index.php>.
- Semi-Annual Budget Requests are limited to \$5,000.
- The window for budget requests will open on January 5 at 12:00 AM EST, and close on January 7 at 11:59 PM EST.
 - The portal uses UTC, which is 5 hours ahead of EST. You will not be penalized for the site's internal time.
- You must list each program you plan to use funds for and the amount you are requesting in each funding category (see ahead).
- There are also several prohibitions on what may be funded (see ahead).

STEP ONE: REQUESTS

Budget Submissions

- You may apply for funding for up to 5 unique projects, events, or trips your organization plans to hold in the spring semester.
- The Finance Committee will interpret the first listed program as your organization's highest priority, in descending order.
- Each project must be as detailed as possible with planned purchases.
- **Include all calculations in your funding request.**

STEP ONE: REQUESTS

Funding Categories

- **Building/Venue Rental:** Funds for securing a location, excluding lodging.
- **Capital Expenditures:** Funds for purchases over \$500 with benefits lasting more than one year.
- **Clothing:** Funds for purchasing clothing or costumes for productions.
- **Dues and Fees:** Funds for paying activity-related fees, excluding prohibited dues or fees.
- **Equipment Rental:** Funds for temporarily renting equipment.
- **Labor Fees:** Funds for paying labor fees, excluding compensation for employees hired by the organization on a permanent basis.
- **Lodging:** Funds for providing accommodation during official activities or travel.
- **Printing and Publicity:** Funds for producing and disseminating printed materials for promotion.
- **Speaker Fees:** Funds for paying honoraria to guest speakers.
- **Supplies:** Funds for essential tangible goods and materials.
- **Travel:** Funds for transportation outside of Chapel Hill.

STEP ONE: REQUESTS

Prohibited Purposes

- 1** **Political:** Expenses for electioneering or lobbying members of government.
- 2** **Religious:** Expenses for events that aim to indoctrinate or recruit for a specific religion.
- 3** **Immediacy:** Expenses which will be realized entirely in the next semester or are beyond immediate operational needs.
- 4** **Donations:** Donations to organizations, with exception of substitution for a speaker honoraria.
- 5** **Food:** Expenses for food for consumption, outside of the Food Insecurity Cycle.
- 6** **Advertisements:** Expenses for advertisement in publications with the exception for campus candidates.
- 7** **Individual Gain:** Expenses which result in tangible gain for one person, not including salaries, stipends, or candidate reimbursements.
- 8** **Dues:** Expenses to National/Superior organizations which the organization is a member, or defrayment of member dues.
- 9** **Gift Cards:** Expenses for gift cards, vouchers, cash cards, or any token which may be exchanged for some other item of value.
- 10** **Legality:** Alcohol, Tobacco, and Illegal Substances.

STEP ONE: REQUESTS

Rules to Keep In Mind

- **Travel:** Requests must follow specific formulae.
 - For gas, trips under 100 miles must use \$0.54 per mile per car and trips over 100 miles must use \$0.33 per mile per car.
 - You may request up to 60% of the cost of any air travel.
 - All trips that you wish to be funded must be accompanied by an itinerary detailing the events that are planned.
- **Publication Printing:** If your request is >\$100, find your multiplier by calculating your number of annual print & online editions:

	Print = 1	2	3	4	5+
Web = 0	0.15	0.40	0.65	0.90	$(NPI/2)-1$
1	0.65	0.90	1.40	1.90	$NPI/2$
2+	0.90	1.40	2.15	2.90	$(NPI/2)+1$

STEP ONE: REQUESTS

Rules to Keep In Mind Cont.

- You must recognize the role USG played in funding any event held in part or full with USG funds through verbal or written endorsement.
- You may not sell any items acquired with USG funds. Any tangible items must be given away free of cost.
- This list is **not** exhaustive. Read Title VI of the General Statutes for more information, as well as further details of all rules listed in this presentation.

Application Demonstration



[HTTPS://CONGRESS-FINANCE.UNC.EDU/APPROPRIATIONS/](https://congress-finance.unc.edu/appropriations/)

STEP TWO: HEARINGS

Funding Hearings

- The Senate Finance & Appropriations Committee hears requests in three subcommittees on behalf of the full Senate.
- Finance hearings will be held in the evening between January 12 and 20. Each organization will be randomly assigned to a hearing time slot during these dates.
- During the funding hearings, each organization will be given a short window to present their request and then will be subject to questioning from members of the Undergraduate Senate.
- You must take and pass the Treasurer's Test with a score of 80% or above by 6pm on January 12 to be eligible for funding.
 - If you took and passed the Treasurer's Test in the Fall, you **do not** need to retake the test for the Spring

STEP TWO: HEARINGS

Questioning

- During your organization's funding hearing, senators will try to gauge how your request aligns with the objective criteria.
- Examples of questions they may ask:
 - "How many people do you expect to attend your event" (Representation)
 - "Which of these programs would you prioritize funding for" (Vitality)
 - "Will more events in this vein be held by other organizations throughout the semester?" (Specialization)





STEP TWO: HEARINGS

The Budget Bill & Full Senate Consideration

- After hearings in the Finance Committee are complete, subcommittee recommendations are reconciled to meet the Budget Total and then compiled into a Budget Bill which includes all budgetary appropriations.
- The Senate will consider and ultimately vote on the Budget Bill – once the Senate approves a Budget Bill and it is signed by the Student Body President, you will have access to your appropriated funds.

STEP THREE: SPENDING

Expending Your Funds

- All USG appropriations go through the CUSO system with the Carolina Union Business Office to expend funds.
- In order to use your funds, you may either request reimbursement or the use of the Union's P-Card at <https://heellife.unc.edu/organization/rsofinances>.
- You should follow all of the steps required in the relevant forms and reference the supporting documents on that Heel Life page.
- Always make sure to save receipts and other documentation of your expenditures.

STEP THREE: SPENDING

Expending Your Funds Cont.

- As your term progresses, if you realize the categories you were appropriated funds to would better be used elsewhere, you may request a line-item change using the form on the USG Executive Council's HeelLife.
- All funds appropriated in the spring semester will remain active for student organizations until June 30 at 5:00 PM when funds revert to the General Reserve.
 - The Carolina Union Business Office may have earlier deadlines for expenditure; more information will be released when funds are approved.
- Reimbursement requests must be submitted within 45 days of the purchase made or travel held.
- We recommend against using payment apps like Venmo or Cash App for purchases.

STEP THREE: SPENDING

New Rules

- Starting this year, all organizations will need an organizational bank account with a third-party banking organization and an EIN from the IRS
- You will be able to receive an appropriation from the Senate without proof of either, but to receive your funds you will need both. The Carolina Union Business Office will not reimburse to individual bank accounts.
- If your organization is not a registered Vendor with the University, set this up AS SOON AS POSSIBLE. It can take up to a month for the university to process your information.
- Information about the steps to open an account and secure an EIN can be found on the Carolina Union's website and Student Legal Services has resources on these processes.
- Beginning next year, organizations who do not spend at least 1% of the funds they have been appropriated by the Senate will be ineligible for funding in the Fall Semester of the subsequent year.

Violation of Rules

- If an organization violates the rules set forth by Title VI of the General Statutes, the Treasurer reserves the right to the following actions:
 - Freezing of funds, disabling organizations from spending their appropriation.
 - Requiring of remuneration for any funds found to be in violation of the law.
- Serious violations of the Treasury Laws can and will be prosecuted through University disciplinary procedures in a manner consistent with the *Student Code of Conduct*.

STEP THREE: SPENDING

Final Note

- Funding from the Undergraduate Senate is not meant to be the only source of income for your organization. With a budget of roughly \$1M each year and over \$4M in requested funds, the Senate does not have the capacity to fully fund every organization.
- You are encouraged to explore alternative sources of income such as dues, fundraisers, and other grant programs.
- All the information discussed tonight and more can be found at senate.unc.edu/funding.

Question & Answer



CHECK THE ZOOM CHAT FOR THE ATTENDANCE FORM



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