1. CALL MEETING TO ORDER

2. ROLL CALL

3. APPROVAL OF MINUTES - April 4, 2007

4. PUBLIC COMMENT

5. PRESIDENT'S REPORT
   a. UM Homepage Survey
   b. Legislative Thank you Luncheon - April 24
   c. ASUM End-of-year Reception - May 2
   d. Outgoing/Incoming Senate Pizza Party at President and Mrs. Dennison's - Thursday, May 3
   e. Other

6. VICE PRESIDENT'S REPORT
   a. Committee Appointments/Removals
   b. KBGA @ 8:30 a.m. Thursday
   c. Other

7. BUSINESS MANAGER'S REPORT
   SPECIAL ALLOCATION - $6,391.47
   S.T.I.P. - $102,085.59
   ZERO BASE CARRYOVER - $93,045.23
   a. UM Jazz Band STIP request - $862.87/$863 (6-0)
   b. Cutbank STIP request - tabled in committee
   c. Woodsmen's Team STIP request - $0/$631 (6-0)
   d. Woodsmen's Team Special Allocation request - $3,362.49/$1,154 (6-0)
   e. Military Law Society Special Allocation request - $360/$218 (6-0)
   f. Interfraternity Council Special Allocation request - $975/$825 (6-0)
   g. Panhellenic Council Special Allocation request - $975/$825
   h. H.E.A.C. Special Allocation request - $200/$200
   i. Students for Economic and Social Justice Special Allocation request - $75/$75
   k. Other

8. COMMITTEE REPORTS
### ASUM Senate Tally Sheet

**Senate Members**
- Jacob Childers
- Joe Diaz
- Eric Fulton
- Scott Gauthier
- James Greer
- Lucas Hamilton
- Allie Harrison
- Erica Henderson
- Jordan Hess
- Trevor Hunter
- Dustin Leftridge
- Sean Morrison
- Kevin Nalty
- Ryan Nalty
- Tara Ness
- Svein Newman
- Kimberly Pappas
- Eric Schultz
- Ali Tabibnejad
- Pete Tolton

**ASUM Officers**
- Andrea Helling: President
- Cedric Jacobson: Vice-President
- Bryce Bennett: Business Manager

**Faculty Advisors**
- Professor Anderson
- Professor Ausland

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**Roll Call**

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**Date:** April 11, 2007

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Chair Jacobson called the meeting to order at 6:02 p.m. Present: President Helling (7:20), Vice President Jacobson, Business Manager Bennett; Senators Childers, Diaz, Fulton, Gauthier, Greer, Hamilton, Harrison, Henderson, Hess, Hunter, Leftridge, Morrison (6:06), R. Nalty (6:03), Ness, Newman, Pappas, Schultz, and Tolton (6:05). Senators K. Nalty and Tabibnejad were excused.

The Chair recognized the presence of Senator Ryan Nalty.

The minutes for April 4, 2007, were approved.

Public Comment - None

President’s Report
(Jacobson presented the report in the absence of President Helling.)
a. Senators were encouraged to go to the UM home page and fill out the survey on web page functionality.

The Chair recognized the presence of Senator Fulton.
b. A legislative thank-you luncheon will be held in Helena April 24 with transportation for students to attend.

The Chair recognized the presence of Senator Morrison.
c. The last Senate meeting this semester will be Wednesday, May 2nd, at which time the new Senate will be sworn in. The meeting will be preceded by a 5 p.m. reception.
d. President and Mrs. Dennison will host a pizza party Thursday, May 3rd, at 6 p.m. for the outgoing and incoming Senates.

Vice President’s Report
a. The following committee removals were approved: Transportation Board - Jose Diaz (moved by Lethridge-Greer); Elections - Eric Schultz (moved by Pappas-Henderson). The following committee appointment was approved by unanimous consent: Transportation Board - Dustin Lethridge (moved by Hess-Greer).
b. Senator Pappas will represent ASUM on KBGA Thursday at 8:30 a.m.

Business Manager’s Report
SPECIAL ALLOCATION - $6,391.47
S.T.I.P. - $102,085.59
ZERO BASE CARRYOVER - $93,045.23
a. UM Jazz Band’s STIP request for $862.87 was approved for Budget and Finance’s recommendation of $863 by unanimous consent on a motion by R. Nalty.
b. Cutbank STIP request - tabled in committee
c. Woodsmen Team’s STIP request for $0 (split from a Special Allocation request by Budget and Finance) was approved for Budget and Finance’s recommendation of $1,631 by unanimous consent on a motion by Jacobson.
d. Woodsmen Team’s Special Allocation request for $3,362.49 was approved for Budget and Finance’s recommendation of $1,154 by unanimous consent on a motion by Jacobson.
e. Military Law Society's Special Allocation request for $360 was approved for Budget and Finance's recommendation of $218 by unanimous consent on a motion by Jacobson. A motion by Diaz-Harrison to increase it to $360 failed.
f. Interfraternity Council's Special Allocation request for $975 was approved for Budget and Finance's recommendation of $825 passed. A motion by Diaz-Gauthier to increase it by $150 failed.
g. Panhellenic Council's Special Allocation request for $975 was approved for Budget and Finance's recommendation of $825 by unanimous consent on a motion by Jacobson.
h. Environmental Action Community's Special Allocation request for $200 and recommended by Budget and Finance for same passed.
i. Students for Economic and Social Justice's Special Allocation request for $75 and recommended by Budget and Finance for same passed.
j. Fiscal Policy (Exhibit A) amendments were presented by Business Manager Bennett as approved by Budget and Finance. A motion by Hess-Greer to amend 22.2 by striking "between" "and $150.00", inserting "over" after "Purchases and deleting 22.3 failed.

The Chair recognized the presence of President Helling.
A motion by Hess-Bennett to strike 22.1 and 22.3 and have 22.2 amended to read: "Any purchase made by the ASUM, its member organizations or executive officers and agencies may be made subject to funds availability and confirmation from the Accountant or Office Manager, provided the purchase is consistent with the purchaser's budget and Fiscal Policy" passed after a previous question call by Ness. Childers-Pappas moved to reinstate "or tools used for proselytizing to non-members with ASUM funds" in 24.1. A motion by Henderson-Gauthier to amend it by adding at the end "with the exception of general group promotion" passed. After a previous question call by R. Nalty, the amended motion to amend passed. A motion by Newman-Schultz to insert "at least" before "one year" in 20.1 passed.
A motion by Newman-Greer to insert "sex" between "age" and "gender" in 3.4 was approved by unanimous consent on a motion by Greer. Fiscal Policy as amended passed 16-3 on a roll call vote (see Tally Sheet) after a previous question call by Helling.

Committee Reports
a. Graduate Appeals (Helling) - Decisions were made on appeals.
b. Provost Search (Helling) - The search continues.
c. Journalism Dean Search (Helling) - Visits by candidates continue.
d. Relations and Affairs (Schultz) - SB28 was tabled indefinitely. SB34 rewrite was not received. SB42 received a do pass recommendation (4-2).
e. on Membership (Ness) - The Student Veteran Association has just regrouped and would like recognition this Spring. Since the date for this year's recognition process has passed, Helling-Morrison moved to suspend House Rules and other applicable ASUM documents to allow for this group's recognition. The motion passed. The group was approved for recognition on a motion by Ness-Schultz. A motion by Helling-Schultz to reinstate House Rules and other applicable ASUM documents was approved by unanimous consent on a motion by Schultz.
f. Publications Board (Bennett) - Applications are in for Kaimin editor and business manager, and interviews will be held soon. Editor and business manager for Cutbank and Camas will be next.

g. Music Union (Newman) - They talked about subgroup requests.

h. Enrollment Management (Jacobson) - Projects for the next biennium have been made.

i. Education Dean Search (Jacobson) - Campus visits will be coming soon.

j. Transportation (Hess) - They talked about budgeting and future programs.

k. Sustainability (Hess) - They talked about hiring a new coordinator.

l. Transportation Working Group (Helling) - A 10-year plan will be presented.

Unfinished Business

To see a list of resolutions in their entirety with the action taken on them, please go to: www.edu/asum/government/resolution.htm.

a. SB28-06/07 Resolution amending Personnel Policy Item 3.0 was tabled indefinitely in committee and was removed from the docket on a motion by Helling-Tolton.

b. SB34-06/07 Resolution to send Montana Kaimin Fee Increase to Referenda - in committee.

c. SB42-06/07 Resolution to Change the Job Description of the ASUM Accountant (Exhibit B) was moved by Helling-Schultz. A motion by Bennett-Henderson to amend the last two paragraphs as follows passed, and the amended resolution was approved by unanimous consent on a motion by Schultz after a previous question call by Hunter:

Whereas, the ASUM Accountant has filled out an In-Range Progression Plan to relay the changes in job duties to UM Human Resource Services;

Therefore, Let It Be Resolved that the Associated Students of The University of Montana approve the additional duties of the ASUM Accountant as the supervisor of the Montana Kaimin Office Manager."

New Business

a. Resolution for just wages for UM janitors

b. Resolution to amend Personnel Policy 3.0

c. Resolution regarding ASUM oversight of possible ASUM Activity Fee increase

d. Resolution opposing 3-credit graduate student credit cap

e. Resolution to amend Bylaws regarding Publications Board

f. Resolution regarding parking decal

Comments

The meeting adjourned at 8:43 p.m.

Carol Hayes
ASUM Office Manager
FISCAL POLICY
(Updated 03/01/06)
The Associated Students of The University of Montana

1.0 DIRECTIVE. All monies held by the Associated Students of the University of Montana (ASUM) are ultimately State funds and, thus, under the control of the Board of Regents of Higher Education. These funds are collected by The University of Montana. Provided they are legal and conform to all State and Board of Regents' policies, all allocations and expenditures of these funds are controlled by the ASUM. In addition to these legal and policy requirements, the ASUM is hereby adopting a fiscal policy regarding procurement, distribution, and expenditure of the ASUM Activity Fee.

2.0 STATEMENT OF SCOPE. The ASUM shall fund only those activities whose primary beneficiary is the student population at The University of Montana. No ASUM funds may be used for alcohol, awards, gifts, or private investment. Any individual participating in or utilizing any ASUM funded program must pay the ASUM Activity Fee and/or another specifically designated ASUM assessment.

3.0 STUDENT GROUP RIGHTS
3.1 Student groups that deposit monies with the ASUM that are not allocated from the ASUM have the right to withdraw and use the funds for any purpose as long as they are in compliance with University policy, Montana Law and Federal Law.
3.2 Should a student group's ASUM recognition lapse, the active membership of the group will retain the right to withdraw non-ASUM allocated funds for group activities as specified in Item 3.1 above.
3.3 The ASUM will, to the best of its abilities, expedite student group transactions.
3.4 Student groups have the right to request funds from ASUM without fear of discrimination based on race, ethnicity, creed, age, gender, sexual orientation, disability, campus agency, political affiliation, or outside funding source.

4.0 DEFINITIONS.
4.1 "Academic Week" refers to a week in which there are four or more days of instruction.
4.2 "Accountant" refers to the ASUM Accountant.
4.3 "Board" refers to the Board on Budget and Finance.
4.4 "Business Manager" refers to the ASUM Business Manager.
4.5 "Office Manager" refers to the ASUM Office Manager.
4.6 "Organization" means agency, member group, or organization.
4.7 "President" refers to the ASUM President.
4.8 "Senate" refers to the ASUM Senate.
4.9 "Senator" refers to a member of the ASUM Senate.
4.10 "S.T.I.P." refers to State Term Investment Pool.
4.11 "University" refers to The University of Montana.
4.12 "Vice President" refers to the ASUM Vice President.

5.0 REFUNDS OF THE ASUM ACTIVITY FEE.
5.1 Pursuant to the First Amendment of the Constitution of the United States of America and the decision rendered by the California Supreme Court in Smith v Regents of the University of California, ASUM may not compel a person to contribute money to support political, religious or ideological causes.
5.2 Therein, all activity fee paying students of The University may request a pro-rata refund of any activity fee monies allocated to (a) support organizations whose sole purpose is political, ideological or religious or (b) organizations or agencies for events or activities that are political, ideological or religious.
5.2.1 The Business Manager shall upon the receipt of a request for a refund determine the percentage of the activity fee affected. This percentage of the activity fee shall be the refund.
5.3 Refund monies will be removed from the Zero Based Carryover Fund.
5.4 Students must come before the Business Manager and fill out an activity fee request form from the Business Manager stating their reason for the to receive a refund of funds allocated to organizations or agencies who have activities or events that demonstrate political, religious or ideological beliefs.

6.0 ASUM RECOGNITION.
6.1 No organization shall be eligible for ASUM funding unless it has obtained recognition from the Board on Member Organizations and approval from the Senate by majority vote.
6.2 Any organization which conducts an event, activity, or program funded with monies originating in whole or in part with the ASUM shall provide on any program, poster, or other advertisement or promotional material, a credit referring to the partial or total funding by the ASUM. Examples of such credit shall include at least one of, but are not limited to, the following:
6.2.1 Presented by (organization), an organizational member of the Associated Students of the University of Montana.
6.2.2 An official ASUM insignia authorized by the Senate.
6.3 Any member organization not in compliance with Item 6.1 may face disciplinary action as stated in Item 21.0 of the Fiscal Policy, unless this requirement has been previously waived by the Senate.
6.4 Any member organization not in compliance with Item 18.3 may be denied recognition by the Board on Member Organizations or the ASUM Senate. Organizations denied recognition for this reason shall not be eligible for ASUM funding until they have complied with The University of Montana's Policy regarding off-campus accounts, gained recognition from the Board on Member Organizations and approval from the ASUM Senate.
7.0 LIABILITY. As provided by Board of Regents' policy, the ASUM's liability for the actions of individuals or organizations is limited to those actions conducted directly with approved ASUM funds.

8.0 LEGISLATION.
8.1 A quorum for the Board meetings shall be defined as a minimum of four members, one of whom may be the Business Manager.
8.2 The Executives and the Senate shall submit all proposals of any financial nature to the Board for its recommendation, unless provided for otherwise in the Fiscal Policy.
8.3 All decisions regarding financial affairs must be passed by simple majority of the Board. Any Board decision may be overturned by a two-thirds majority vote of the Senate.
8.4 When introducing recommended legislation, the Board has seconded motion status. The Business Manager may introduce matters of a financial nature to the Senate without being required to wait one week for the legislation to become "Unfinished Business" as described in Robert's Rules of Order and the ASUM House Rules.

9.0 STUDENT APPROPRIATIONS.
9.1 The ASUM shall allocate and monitor the use of the ASUM Activity Fee.
9.1.1 Pursuant to the First Amendment of The Constitution of the United States of America and the decision rendered by the U.S. Supreme Court in Rosenberger vs. the University of Virginia, funding will not be denied to organizations that are religious in nature or promote religion on the basis of the views, beliefs and opinions they promote or support.
9.1.2 ASUM organizations shall not directly contribute to a campaign or political organization with ASUM allocated funds. This does not include hours worked on a candidate or political organization's behalf or money contributed for the purpose of gaining tools and supplies for the organization's use. ASUM organizations shall not use ASUM funding to support specific political candidates or an affiliation with political parties. In all instances the ASUM shall be provided assurances that the limitations on partisan activities are being observed.
9.1.3 Notwithstanding any other provision of these Student Activity Fee funding guidelines, no student news, information, opinion, entertainment, academic or media communication shall solely be deemed ineligible for funding because of the ideas or viewpoints expressed or advocated by the recognized organization.
9.2 Budgeting Time Period. Budgeting for the next fiscal year shall be accomplished during the first seven academic weeks of the Spring Semester.
9.3 Recognition for Budgeting. Recognition status shall have been determined by the Board on Member Organizations before an organization may apply for any funds from the ASUM as designated in ITEM 6.1.
9.4 Budget Request Form and Budgeting Packet. The Business Manager shall prepare a budget request form and a comprehensive packet explaining the budget process including
a timeline. The budget request form and packet shall be made available to all organizations by the third academic day of the Spring Semester in the ASUM office. The form and packet shall be available until Student Forum as designated in ITEM 9.6.

9.5 Allocation Figures. During the second academic week of the Spring Semester, the Business Manager and the Accountant shall determine the total allocation figures for the upcoming fiscal year. This shall be done by determining the actual activity fee income for the prior fiscal year and budgeting 100% of that amount as well as the balance in the Unused Allocation account. The Administrative Assessment and Special Allocation budgets must be included in this amount. These figures shall be forwarded to the President, the Board, and the Senate. Upon receipt of allocation figures, the Board shall develop preliminary Categorical Funding Percentages.

9.6 Student Forum. Upon receiving the total appropriation figures, the Board shall hold at minimum of one (1) publicized student forum, which shall be organized by and presided over by the Business Manager. A forum shall be held during the second academic week of the Spring Semester. The Business Manager shall explain the budgeting procedure to participants and answer questions. The Board shall present the proposed Categorical Funding Percentages at the Student Forum. Categorical Funding Percentages refer to the percentage of the Activity Fee budget allocated to each funding category.

9.7 Funding Categories. The Board shall categorize every ASUM recognized organization into one of the following Funding Categories:

9.7.1 Interest Organizations. Groups that provide education and activities centered around a specific idea or area of interest.

9.7.2 Academic Honors Organizations. Groups that provide enhancement in a field or study by providing a specific service or support to students involved in that field or area of study.

9.7.3 ASUM Administrative Agencies.

9.7.4 Student Service Organizations. Groups that provide service to the campus or community and may develop skills used when performing the service.

9.7.5 Sports Organization Union. Groups that provide recreation primarily for students at the University. The SOU shall submit one budget for all clubs being so recognized, that budget and budgets of each subsidiary organization shall be submitted to the ASUM Business Manager one week prior to the executive recommendation.

9.7.6 Student Support Organizations. Groups that provide support for minority students on campus and/or ethnic or cultural celebration or education thereof.

9.7.7 Student Programs. University programs that involve students under the direct supervision of University staff. They may be funded and/or housed in part by a University department.

9.7.8 Music Organization Union. The MOU will be composed of all ASUM-recognized music groups. The MOU shall submit one budget for all clubs being so recognized and that budget - along with budgets of each subsidiary organization - shall be submitted to the ASUM Business manager one week prior to the executive recommendation.

9.7.9 Senate Discretionary.

9.7 Budget Request Form Due Date and Approval. Budget Request Forms shall be due at the end of the third academic week of the Spring Semester. The Business Manager shall inform organizations of the due date for Budget Request Forms. No Budget Request Form shall be accepted after that date. Budget Request Forms shall be submitted to the
Business Manager so that each one can be approved solely on the basis of accuracy and adherence to the Fiscal Policy. If the Business Manager does not approve a budget request form due to its apparent deviation from the Fiscal Policy, the request form shall be taken to the Board. A majority vote of the Board shall be required to approve any Budget Request Form not initially approved by the Business Manager.

9.9 Executive Recommendation. The President, in consultation with the Vice President and Business Manager, shall propose a budget. The Senate Discretionary shall remain at a minimum level of two percent of the total allocation amount throughout the Executive Recommendation. Should the President choose an executive recommendation below the amount provided, the excess amount must be placed in the Senate Discretionary category. The President shall submit copies of the Executive Recommendation and an explanation thereof by Wednesday of the fourth academic week to the Senators. A copy shall be made available in the ASUM office for organizations to review.

9.10 Formal Lobbying. A minimum of three (3) formal lobbying sessions shall be scheduled in advance for the fifth academic week. Each organization shall schedule a ten (10) minute period to explain their budget request. The Business Manager shall schedule these appointments on a first come, first serve basis; however, each organization shall have the opportunity to schedule an appointment. Formal lobbying for any organization shall be limited to the scheduled appointment for that organization. Senate lobbying sessions shall be publicized during the fourth academic week. All Senators and Executives shall attend the formal lobbying sessions. Any Senator or Executive unable to attend must have prior written approval from the Vice-President. Unexcused absence from a lobbying session shall be considered equivalent to an unexcused absence from a Senate meeting.

9.11 Informal Lobbying. Not less than one (1) hour of informal lobbying shall occur after each night of Formal Lobbying.

9.12 The Order of Funding Categories. The order of discussion on categories for Final Budgeting shall be selected by lottery during the Business Manager's report no less than one (1) week prior to Final Budgeting.

9.13 Senate Call may occur by the Tuesday of the seventh academic week, if requested by a majority of Senators. At this time, Senators can request organizations to appear and justify their budgets and ask questions of their functions. Organizations cannot appear without being officially called by a Senator. Senate Call procedures shall be as follows:

9.13.1 Each Senator may call a maximum of two member organizations.

9.13.2 Each Senator has the right to the floor when his or her organization has been called.

9.13.3 Each organization called may answer a question from any Senator, but no lobbying shall be allowed.

9.13.4 No member organization may be called more than once during the Senate Call except by a two-thirds majority vote on a privileged motion, which shall not be debatable.

9.14 Final Budgeting. Final Budgeting shall occur by the weekend of the seventh academic week. The Senate may, by a simple majority vote, schedule Final Budgeting for more than one (1) day or on a Saturday. If this the former option is chosen, specific categories shall be scheduled for budgeting each day not less than one week prior to the first budgeting meeting.

9.14.1 Beginning Final Budgeting. Final Budgeting shall come under the Business
Manager's Report.
A. The order of the categories shall be written prominently at the front of the meeting area.
B. During the Final Budgeting Session, the Vice-President shall preside over the meeting. The Accountant and the Office Manager shall be present to record transactions of the meeting.
C. The total amount in the budgeted Senate Discretionary Account shall be prominently written in plain view of the meeting area. All motions to add or subtract funds from an organization shall be made into or out of this fund. No motion shall be made by the Senate to directly move any funds from one organization's proposed budget to that of another. Two motions must be made: First, to place funds from an organization's budget into the Senate Discretionary Account, and, second, to remove funds from the Discretionary Account into the proposed budget of an organization.
D. The Sports Organization Union and the Music Union shall be funded as a category, without regard to specific member organizations.
E. An unexcused absence by a Senator from final budgeting is automatic grounds for impeachment.
9.14.2 (NOTE: In ITEM 9.14.2 "Executives" excludes the Chair.) Amendments to the Executive Recommendation. Final Budgeting shall not be closed until the first round has been completed.
A. Discussion of categories shall follow the order selected by lottery as mentioned in 9.12.
B. Once a category has been opened, by a simple majority vote of the Senate, in the first round of discussion, every organization in that category will be recognized, in an order established by the Chair, for the proposal of amendments to the Executive Recommendation. The proposal of amendments shall be open to the Senators and Executives. During the first round of budgeting, budget line-items may be decreased by a simple majority vote and may only be increased by a four-fifths majority vote of the Senate.
C. Categorical Funding Percentages will not be adhered to during final budgeting.
D. All subsequent rotations shall follow the same procedure.
E. A category shall remain open for discussion until the end of the first rotation. The motion to end discussion on a category shall be passed by a two-thirds majority vote. Once the first round of discussion on a category has been closed, it shall not be reopened until all other categories have been closed for the first round of discussion.
F. If any funds remain in the Senate Discretionary Account after all the categories have been closed for the first round of discussion, a second lottery shall select the order of categories to be reopened for a second round of discussion. During the second round, budgets of organizations can only be increased. During the second round, budgets of organizations can only be decreased with a four-fifths majority vote of the Senate.
G. Once no funds remain in the Senate Discretionary Account and all categories have been closed for the first round of discussion, Final Budgeting shall be concluded by approval of the Executive Recommendation with amendments by a two-thirds majority vote.
9.14.3 Proposed organizational budgets for an upcoming fiscal year shall go into effect
when the Executive Recommendation is approved by a two-thirds majority vote of the Senate.

10.0 STATUS OF ACCOUNTS.

10.1 Upon request, the Business Manager, Office Manager, or Accountant shall provide any member organization with requested financial information.

10.2 **As provided by an ASUM Organization on their group recognition form** At the beginning of each academic year, or when changes necessitate, organizations must submit the name, address and phone number of those students authorized to request or distribute funds from organization accounts. Any organization not in compliance with this section shall be notified within five (5) business days by the Business Manager and have its account frozen until these requirements are met.

10.3 The Office Manager or Accountant, under direction of the Business Manager, shall approve expenditures that have obtained prior approval through the budgeting process. The Business Manager and the Board reserve the right to refuse payment of non-budgeted expenditures.

10.4 Any expenditure that will cause a line item or a budget-category deficit shall not be paid or approved until the line-item change procedures are followed. (See Item 12.0)

10.5 Any unexpended amount remaining in the following accounts at fiscal year end shall be retained in their respective accounts:
   A. ASUM Administration
   B. ASUM Legal Services
   C. UM Productions
   D. ASUM Childcare
   E. ASUM Off-Campus Renter Center
   F. ASUM Student Political Action

10.6 Any unexpended Senate-appropriated amounts below $3,000 remaining in the following accounts at fiscal year end shall be retained in their respective accounts:
   A. Sports Union
   B. Music Union

10.6.1 Any unexpended Senate-appropriated amounts above the $3,000 carryover limit in the above accounts shall automatically be deposited into the Zero-base Carryover account
at the end of each fiscal year.
10.6.2 Any of the above accounts on appeal may, by 2/3 vote with permission of the Board on Budget and Finance and Senate approval, retain Senate-appropriated monies above the $3,000 limit.

10.7 The organizations listed below which are funded in part or whole by the ASUM Activity Fee are to meet with the Board at least once within the first five weeks of each semester. The purpose of these meetings shall be to update the Board on budgeted activities. These meetings may be attended by the Accountant and/or Office Manager in order to help clarify any budget problems. The Business Manager shall then report the Board's findings and recommendations to the Senate.

(Organization - Income Source)
A. Child Care - Parent User Fees
B. Cutbank - Subscriptions
C. Montana Kaimin - Student Kaimin Fee, Advertisements, Subscriptions
D. Legal Services - Legal Services Trust
E. UM Productions - Ticket Sales, Performing Arts, Concessions
F. Students Tutoring Students - User Fees, Fund User Fees
G. Student Radio Organization - Student Radio Fee
H. ASUM Office of Transportation - Transportation Fee
I. ASUM Office of Off-Campus Housing and Neighborhood Outreach - ASUM Activity Fee
The only exception shall be the ASUM Administration, which shall be reviewed on a monthly basis.

10.8 Any deficit incurred by any organization during a fiscal year shall automatically be deducted from the next fiscal year's budget allocation up to $100. A deficit exceeding $100 shall be handled by reducing the next fiscal year's allocation by $100 and then allowing the organization to repay the difference during the new fiscal year. Any deficit remaining at the end of the new fiscal year will be deducted in full from the next Senate allocation. It should be noted that "payment in full" could have the effect of actually closing down the entire organization.

10.9 Any organization that does not seek recognition for four (4) consecutive years shall have any remaining funds reverted to the Zero-Based Carryover Account.

11.0 SPECIAL ALLOCATION.
11.1 At the beginning of each fiscal year, $16,000 shall be deposited in the Special Allocation account. The Board shall not allocate more than $8,000 before the end of the Fall Semester.
11.2 Requests for a special allocation shall be submitted on a form supplied by the Business Manager, including an account of all itemized expenditures made during the reporting period and a statement of all funds received as income or held as assets to supplement ASUM funds for the organization's activities.

11.3 Requests shall be presented no less than one (1) week before presentation to the Senate unless the Board agrees otherwise.

11.4 Only those organizations that went through the budgeting process for the current fiscal year shall be eligible for a special allocation. Exceptions can be made for organizations that did not exist at the time of the budgeting process or on a case-by-case basis with unanimous support of the Board.

11.4.1 Organizations applying for funding that did not participate in the budgeting process shall only be granted expenditure requests for specific projects occurring in the same academic semester as the request.

11.4.2 Allocation requests for projects in specific line items refused in the prior year's budgeting process shall only be approved through special allocation by unanimous support of the Board.

11.5 The Special Allocation Fund shall not be supplemented by the General Fund or by Zero-Based Carryover for emergency conditions.

11.6 Special Allocation appropriations over $500 will require the group, within two weeks from the completion of the event, to give a brief oral synopsis of the event to the Senate.

11.7 Events previously funded through annual budgeting or previous special allocations are not eligible for future special allocations funding.

12.0 LINE-ITEM CHANGES. Any deviation in line items from the original budget shall be treated as a line-item change. Any organization wishing to make changes in other lines must fill out the appropriate form to obtain the Business Manager's approval. Line item changes outside of categories will be limited to 10% of any organization's budget allocation. If a request is denied, entails a change of intent, or if the Business Manager feels the request warrants the Board's action, the request will be brought before the Board. The Board's decision may be overturned by a two-thirds majority vote of the Senate.

13.0 CONTINGENCY FUND.

13.1 At least twice each calendar year, the Accountant shall determine the amount which would be owed if the three classified employees with the most longevity terminated employment. At no time shall the Senate Emergency Contingency Fund drop below the amount necessary to cover the departure of these three aforementioned employees.

13.2 Increases in this fund shall be determined by the Board and submitted to the Senate for approval by a two-thirds majority vote.
14.0 TRAVEL.

14.1 All travel funded by the ASUM must directly benefit the ASUM and the organization requesting funding.
14.1.1 At the beginning of each fiscal year, $18,000 shall be deposited in the Special Allocation - Travel account.
14.1.2 Standard criteria for requesting travel funding shall be group events and/or training or leadership events that directly benefit the organization.
14.2 The Senate may choose to fund or partially fund transportation costs, and/or registration fees. Travel and lodging reimbursement rates shall be allocated, or partially allocated, according to State or ASUM rates.
14.2.1 At the end of the Final Budgeting Session a set amount of money will be deposited into a Special Allocation - Travel account to be used for travel only. The Board on Budget and Finance shall not allocate more than 40% of this money during Fall semester, with the remaining 60% to be allocated during Spring semester.
14.2.2 Only those groups in the Academic, Honors Organizations, Student Service Organizations, Student Support Organizations, and Student Programs categories are eligible for funds from the Special Allocation - Travel account.
14.2.3 ASUM Agencies, the Sports Organization Union, and the Music Organization Union will be funded travel accordingly during the budgeting process.
14.3 ASUM rates are:
   A. Private Vehicle $0.15/mile
   B. Lodging (4 persons per room) $80.00 max. ($20.00/person)
   C. A "waiver of additional reimbursement" shall be required for travel not covered under State policy.
14.4 The Office Manager or Accountant, under direction of the Business Manager, may approve budgeted travel expenditures.
14.5 Travel requests must be submitted to the Business Manager by the Wednesday of the third week of Fall semester and by the Wednesday of the second week of Spring semester. Requests must be submitted in the semester in which the travel occurs. If a request is placed before the Group Recognition Form deadline, the Group Recognition Form must be submitted in advance of the request.
14.5.1 The Board shall review all requests during the fourth week of Fall semester and third week of Spring semester. Recommendations will be made to be approved by the Senate.
14.5.2 A reserve of no less than 5% of each semester’s total travel allocation shall be maintained for unforeseen or emergency travel occurring after travel lobbying for the current semester.
14.5.2.1 These funds shall only available upon 4/5 approval of the Board.
14.5.2.2 Any excess funds remaining in the reserve after Fall semester shall be rolled over into the total travel fund for Spring semester.
14.6 As with other benefits provided by the ASUM, travel participation approved and obtained through the ASUM shall be limited to activity fee paying members of the ASUM. Representatives of the ASUM organizations as stated on the registration form must verify the status of each applicant described in the travel request documents filed with the ASUM.
14.7 Travel allocation appropriations over $500 will require the group, within two weeks
from the completion of travel, to give a brief oral synopsis of the event to the Senate.

14.8 At the end of each Fiscal Year, any funds left over in the Special Allocations – Travel account shall roll over.

**15.0 ENTERTAINMENT.**

15.1 Expenses for official entertainment, community relations, or public relations may be reimbursed by the ASUM only when such activities are directly related to ASUM objectives.

15.2 Any entertainment by a group using ASUM funds must be budgeted by the Senate or approved by line-item change procedures.

15.3 The ASUM will not provide funds for alcoholic beverages.

15.4 If the entertainment benefits persons from outside the University, the ASUM will pay for its guests and one official host from the ASUM (receptions excluded).

15.5 When the ASUM hosts official guests or prospective appointees for positions requiring specialized training or experience of a professional, technical, or administrative nature, the ASUM will reimburse the cost of meals or light refreshments.

**16.0 INVENTORY.**

16.1 ASUM may purchase equipment for ASUM Administration, all of its agencies, and student groups. Such equipment will be kept in the ASUM Office under the safe-keeping of the Office Manager.

16.2 The Business Manager shall establish a process by which the Office Manager shall check out equipment to individuals and groups requesting it.

16.3 The Business Manager shall be responsible for keeping an inventory of the community equipment.

16.4 The ASUM may request yearly inventory updates on all equipment purchases and supplies (other than general office supplies) from its organizations.

16.5 All sporting equipment purchased with ASUM funds must be checked in and out through Campus Recreation.

**17.0 OTHER INCOME.**

17.1 Generated funds MUST be deposited with the ASUM. The organization may use its discretion as to how they would like this money budgeted, and these funds shall be allowed as carryover at the end of the fiscal year.

17.2 Any grant secured on behalf of any member organization must be reported to the Business Manager.

**18.0 OUTSIDE ACCOUNTS.**

18.1 All external accounts must be reported prior to budgeting as provided on the Budget Request form. If external accounts exist and notification does not occur, the
organization's ASUM account may be frozen.

18.2 The Board may request information on any outside accounts held by organizations when requesting ASUM funds.

18.3 Any member organization is subject to The University of Montana's Policy regarding Off-Campus accounts, unless otherwise required or authorized by law, or unless explicitly authorized in a written agreement between the organization and The University of Montana. Upon violation of this policy, member organizations shall receive sanctions ranging from a warning from the ASUM Business Manager to disciplinary action as stated in Item 21.0 of the Fiscal Policy. Furthermore, the Board may also recommend to the Senate withholding of certain privileges, including but not limited to ASUM recognition and benefits accompanying recognition.

19.0 ASUM Loan Fund.
19.1 The Business Manager and the Office Manager shall administer the loan fund.
19.2 The Business Manager and the Office Manager shall be empowered with the authority to grant or decline loan applications.
19.3 The Business Manager, the Office Manager, and the Board shall be bound by confidentiality.
19.4 The Loan Administrators shall obtain consent of the Board if there is reason to bypass any stipulations of the loan fund, if they are unable to render a fair and impartial decision, or if there is a vacancy in either position.
19.5 If for any reason the applicant feels that any decision rendered by the Loan Administrators was not a fair one, he/she may appeal the decision to the Board, which may reverse the decision by a majority vote.
19.6 All loan funds under the control of the College of Technology Student Government prior to the merger shall be designated for use by College of Technology students, but under the administration of ASUM.
19.6.1 College of Technology students will not be eligible for ASUM loans outside those specifically designated for College of Technology students.
19.7 Eligibility.
19.7.1 A student must have paid the ASUM Activity Fee in the semester the loan is requested.
19.7.2. An applicant must have a cumulative Grade Point Average of at least 2.0 and must not be on academic probation.
19.7.3 The applicant must be presently enrolled in at least his/her second consecutive semester as an activity fee-paying student in the University and must not be in the final semester.
19.7.4 Final approval of short term loans given at the Student Loan Office in the Controller's Office.
19.7.5 If the loan is not secured by a GSL or SLS loan to be received that semester, the applicant must acquire a cosigner who is not a student, not a spouse and who is working at a full-time job if the loan exceeds $50.
19.7.6 The applicant must complete the loan application that can be obtained in the ASUM office.
19.8 Regular loans (exceeding $50).
A. Each loan shall not exceed $200. The interest rate on the unpaid balance shall be seven percent per annum upon receipt of the loan until maturity and twelve percent per annum after maturity.
B. The loan will fall due in ninety (90) days or less depending on the due date set by the Loan Administrators. All loans must be paid prior to registration for a student's final semester at the University.
C. The total of all funds borrowed from the ASUM by one person during the course of a fiscal year shall not exceed $500.
D. College of Technology students will be eligible for the short term loan fund in the first academic semester they pay the ASUM Activity Fee and the last semester. All other rules and restrictions outlined in the loan fund policy will apply equally.

19.8.1 Childcare Loans
A. Each loan shall not exceed $325 per semester per child. The interest rate on the unpaid balance shall be seven percent per annum upon receipt of the loan until maturity and twelve percent per annum after maturity.
B. The loan will fall due upon the student's receipt of financial aid for the current semester. All loans must be paid prior to the student's enrollment in the following semester at the University. Loan balances must be paid prior to the registration for a student's final semester at the University.
C. Student with Childcare loans will be privileged to any other ASUM short-term loans. Students choosing to take Childcare and short-term loans will be subject to all regulations associated with regular ASUM loans.
D. Only students awaiting financial aid will be eligible for a Childcare loan and the privileges associated therein.

19.9 Emergency loans ($50 and under).
A. There shall be a $50 limit per loan, and these loans shall not exceed one (1) calendar month. No interest shall be charged until maturity.
B. The interest rate on the unpaid balance shall be twelve (12) percent per annum, charged from maturity date until paid.

19.10 Overdue loans:
A. If a loan becomes past due, the Controller's Office shall make every effort to collect the loan including the cosigner and turning collections over to collection services.
B. The University Controller's Office and Registrar shall be requested to withhold the registration and transcripts of an individual who has not repaid a past due loan.

20.0 S.T.I.P. INTEREST.
20.1 Funding for one-time capital projects shall be funded from the amount of interest in the State Term Investments Pool. The improvement must be on campus, must benefit students, and must have long-term benefits, and must last for a duration of one year.
20.2 Classified Staff Development shall be funded through S.T.I.P. interest. Classified staff development may include, but is not limited to, enhancement courses through the University or community, in-state and out-of-state conferences and consultations.
20.3 Travel for ASUM Administration and Agencies shall be funded through S.T.I.P. interest.
20.4 The lobbyist salary and legislative expenses shall be funded through S.T.I.P.
interest.

20.5 New agencies not in existence at the time of budgeting shall be funded through S.T.I.P. interest.

20.6 General operating budgets for student groups that did not participate in the budgeting process the prior year shall be funded through S.T.I.P. interest.

20.7 The Board shall recommend specific requests and submit them to the Senate for majority approval.

20.8 At the end of the fiscal year, the remaining funds shall roll over to the next fiscal year.

20.9 Requests must contain three price quotes for the item to be purchased unless three options are not available.

20.1 S.T.I.P. Requests must have a value of at least $250.

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21.0 INFRACTIONS. If an organization commits an infraction of this Fiscal Policy, that organization shall be notified to appear before the Board to explain their action(s). The Board shall be empowered with the authority to send a letter of reprimand to the organization, freeze the organization's account, or take other appropriate action. The balance of the organization's account may be frozen by the Business Manager until the Board has taken action. This Item shall be included in the Budget Request Form.

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22.0 PURCHASING.

22.1 Executive Purchases Under $50,00. Any purchase made by an Executive from the administrative operational budget may be made on the Executive's authority as an officer of the ASUM, subject to funds availability and confirmation from the Accountant or Office Manager provided the purchase is consistent with the purchaser's budget and the Fiscal Policy. Deviations from the budget including line-item changes, special allocations, and S.T.I.P. requests, must be approved by the Board and the Senate. In addition, the purchase is obligated to make a concerted effort to obtain the lowest possible price on the purchase.

22.2 Purchases between $50 and $150,00. Any purchase made by the ASUM, its member organizations, or Executive officers and agencies may be made with the approval of the Business Manager. In case of a purchase made by the Business Manager, purchases shall be made with the consent of the President. Purchases are subject to funds availability and confirmation from the Accountant or Office Manager provided the purchase is consistent with the purchaser's budget and Fiscal Policy. Deviations from the budget including line-item changes, special allocations, and S.T.I.P. requests, must be approved by the Board and the Senate. In addition, the purchaser is obligated to make a concerted effort to obtain the lowest possible price on the purchase.

22.3 Purchases between $150,00 and $1,000,00. Any purchase to be made by the ASUM, its member organizations, or Executive officers and agencies, may be made with the approval of the Business Manager. In case of a purchase made by the Business Manager, purchases shall be made with the consent of the President. Purchases are subject to funds availability, confirmation from the Accountant, provided the purchase is consistent with
The purchasing organization shall obtain a minimum of three price quotes from separate vendors, which must be presented to the Business Manager and documented in permanent files by the Business Manager at the time of release of funds.

22.3.2 The price quotes shall be for exactly the same item.

22.3.3 The purchase must be consistent with the purchaser’s budget and the Fiscal Policy. Deviations from the budget including special allocations, line item changes, and S.T.I.P. requests, must be approved by the Board and the Senate.

22.3.4 The purchase must be made from the vendor who offers the lowest price quote; if, however, the purchase is to be awarded to a higher-priced vendor, documented justification and approval of the Board and the Senate is required.

22.4 Purchases Between $1,000.00 and $5,000.00. Any purchase to be made by the ASUM, its member organizations, or Executive officers and agencies, may be made with the approval of the Business Manager. In case of a purchase made by the Business Manager, purchases shall be made with the consent of the President. Purchases are subject to funds availability, confirmation from the Accountant, provided the purchase is consistent with the purchaser’s budget and Fiscal Policy.

22.4.1 The purchasing organization obtains a minimum of three bids from separate vendors, which must be received on a pre-determined date by the Business Manager in the presence of two other persons either from the Board or the Senate.

22.4.2 The Office Manager shall occupy possession of the sealed bids until the date of their opening.

22.4.3 The price quotes must be for exactly the same item.

22.4.4 The purchase must be consistent with the purchaser’s budget and Fiscal Policy. Deviations from the budget including special allocations, line item changes, and S.T.I.P. requests, must be approved by the Board and the Senate.

22.4.5 The purchase must be made from the vendor who offers the lowest price quote; if, however, the purchase is to be awarded to a higher-priced vendor, documented justification and approval of the Board and the Senate is required.

22.5 Purchases Over $5,000.00. Any purchase to be made by the ASUM, its member organizations, or Executive officers and agencies may be made with the approval of the Business Manager. In case of a purchase made by the Business Manager, purchases shall be made with the consent of the President. Purchases are subject to funds availability and confirmation from the Accountant or Office Manager provided the purchase is consistent with the purchaser’s budget and the Fiscal Policy.

22.5.1 The purchase is sent to the State Purchasing Office for bid letting and procurement. The decision of the state purchasing office shall be considered binding upon the ASUM and its subsidiaries unless convincing documented justification in permanent files, accompanied by a two-thirds majority of the Senate is provided overturning the decision.

22.5.2 The purchase must be consistent with the purchaser’s budget and Fiscal Policy. Deviations from the budget, including special allocations, line item changes, and S.T.I.P. requests, must be approved by the Board and the Senate.
23.1 ZERO-BASED CARRYOVER
23.1 At the end of each fiscal year, any unexpended amounts remaining in organizational accounts not specified in line 10.5 will revert to the Zero-Based Carryover Account.
23.2 During Final Budgeting, the Senate may transfer money from the Zero-Based Carryover account to the General Fund with a 4/5 vote.
23.2.1 The Senate may only transfer funds if the Zero-Based Carryover account exceeds $100,000, and the account cannot be reduced below this base amount.
23.2.2 The maximum amount that can be transferred from the Zero-Based Carryover account to the General Fund during final budgeting is $5,000.
23.3 Any use of Zero-Based Carryover funds must be approved by a 2/3 majority vote of the Board on Budget and Finance and a 2/3 majority vote of Senate.
23.4 Zero-Based Carryover funds shall not be used to increase or used in place of Special Allocation funds or Travel Special Allocation funds.
23.5 In case the 5% reserve in the Special Allocations - Travel account is not sufficient to cover an unforeseen or emergency travel request after scheduled lobbying, the Board on Budget and Finance may approve, with a 4/5 majority of members, a new allocation withdrawn from Zero Base Carryover. Approval of such action by the Senate requires a 2/3 majority.

24.0 INELIGIBLE PURCHASES
24.1 ASUM in recognizing the United States Constitution’s presumption of a separation between religion and state will not purchase sacred religious texts, or tools used for proselytizing to non-members with ASUM funds.

245.0 ASUM ELECTIONS ACCOUNT
245.1 At the beginning of each fiscal year, $3,000 shall be deposited in the ASUM Elections Account from the S.T.I.P Fund. $400 of this fund will be used by the ASUM Elections Committee to promote voter turnout.
245.2 After expense forms have been approved by the ASUM Elections Committee, ASUM will match 50% of candidate expenditures with receipts in the form of a reimbursement.
245.3 Any claimed expense without a receipt will not qualify for the matching reimbursement.

Approved
16-3 roll call vote
4/11/04
Resolution to Change the Job description of the ASUM Accountant

Whereas, the ASUM Accountant has been assigned the task of overseeing the Kaimin Office Manager;

Whereas, this change is important to ensure an organized and productive student newspaper;

Whereas, the ASUM Accountant has filled out an In-Range Progression Plan to relay the changes in job duties to UM Human Resource Services Relations;

Therefore, Let It Be Resolved that the Associated Students of The University of Montana approve the additional duties of the ASUM Accountant as the supervisor of the Montana Kaimin Office manager. In-Range Progression Plan to change the job description of the ASUM Accountant position.

Authored by: Bryce Bennett, ASUM Business Manager


Passed with unanimous consent 4/11/07