FINANCIAL PROCEDURES

WHAT'S CHANGING....



npsa
NEW PALTZ STUDENT ASSOCIATION

almost everything

BIG THINGS TO KEEP IN MIND

npsa
NEW PALTZ STUDENT ASSOCIATION

IMPORTANT CLUB AND ORANIZATION UPDATES FOR 2026-2027

Events

- reserve your space: FUSE form (1)
- get event approval: through engagement platform once space is approved (2)
  - all SA club events ON CAMPUS

Money

- no more out of pocket spending (YAY)
- reimbursements only for travel

Fundraising

- through **Snap! Raise** only - SA will set up your fundraisers for you when you're ready
- no bake sales or charging $ for any club event
- clubs cannot collect money to donate to a cause/beneficiary
  - direct donation sites only (through QR or websites)

Advisors

- clubs with allocations of more than $5,000 are required to have a professional staff advisor from the college
  - (@newpaltz.edu email mandatory)
  - you'll have through the end of fall 26 semester to find an advisor, SA/CSE can help!

WHAT'S NEW

BEFORE WE GET STARTED

https://forms.cloud.microsoft/r/1jyjzdnPtv

ONE treasurer per organization...
ONLY the treasurer can submit purchase requests

Amazon(ish)

Contractual

MONEY MATTERS

UNDERSTANDING SPENDING

Food

Vendors

SO WHERE CAN WE ORDER FROM?

Amazon

Sodexo

Approved off-campus food vendors

Approved business vendors

Print Shop

Contractual (this is for groups that have annual fees, subscriptions, services, league fees, etc.)

Service providers (contracts)

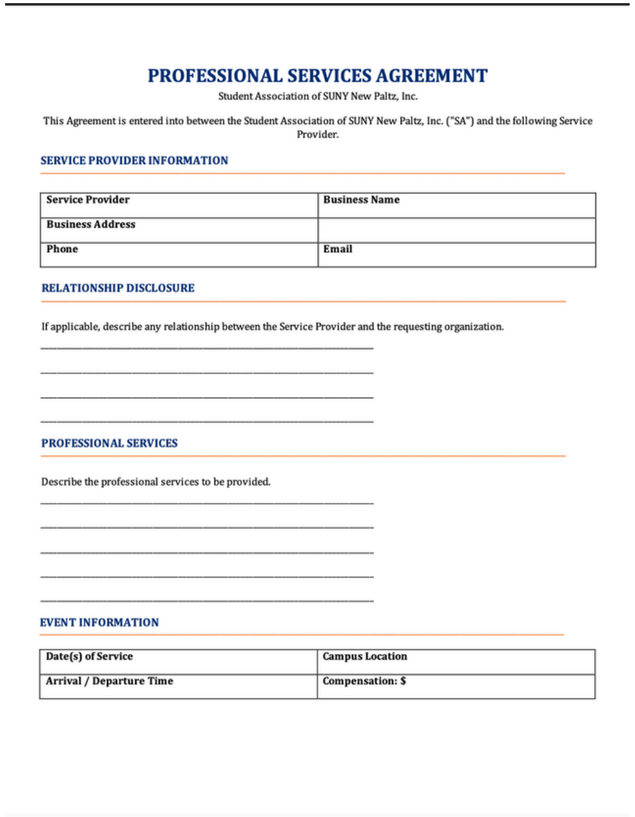
- professional
- student



TRAVEL is the only thing that can be reimbursed. ALL travel requires quotes, approval & travel roster!

CONTRACTS AND WORKING WITH VENDORS WILL ALSO LOOK DIFFERENT

REMEMBER:
no reimbursements, no student will be permitted to pay ANY vendor or person and get reimbursed (on behalf of a club)



PROFESSIONAL SERVICES AGREEMENT

Student Association of SUNY New Paltz, Inc.

This Agreement is entered into between the Student Association of SUNY New Paltz, Inc. ("SA") and the following Service Provider.

SERVICE PROVIDER INFORMATION

Service Provider	**Business Name**
Business Address	
Phone	**Email**

RELATIONSHIP DISCLOSURE

If applicable, describe any relationship between the Service Provider and the requesting organization.

_____

_____

_____

_____

PROFESSIONAL SERVICES

Describe the professional services to be provided.

_____

_____

_____

_____

_____

EVENT INFORMATION

Date(s) of Service	**Campus Location**
Arrival / Departure Time	**Compensation: $**

TERMS & CONDITIONS

- Service Provider is an independent contractor and is responsible for all applicable taxes, insurance, licenses, permits, and expenses unless otherwise agreed in writing.
- Service Provider agrees to perform the services in a professional manner and in compliance with applicable federal, state, local laws, and Student Association/SUNY New Paltz policies.
- Either party may cancel this Agreement with reasonable written notice. If services are partially completed, payment shall be made only for satisfactorily completed work.
- Service Provider shall not assign this Agreement or subcontract services without prior written consent.
- This Agreement constitutes the entire agreement between the parties.
- This Agreement shall be governed by the laws of the State of New York.

STUDENT ORGANIZATION

Name of Organization:
Primary Contact:
Email of Primary Contact:

SIGNATURES

Student Association	**Service Provider**
Name	Name
Title	
Signature	Signature
Date	Date

REQUIRED DOCUMENTATION [SABO USE ONLY]

☐ W-9 Attached (required)

☐ Certificate of Insurance Attached (if required)

IMPORTANT INFORMATION

Before services begin, this Agreement must be fully executed by both parties. The Student Association Business Office must receive a completed W-9 and Certificate of Insurance (if applicable). Members of student organizations are not authorized to execute or approve contracts on behalf of the Student Association. Payment will be issued on Net 30 terms unless otherwise specified.

the Business Office will work with vendors to complete these forms and arrange payment

BUT CAN WE ‘HIRE’ STUDENTS AS VENDORS?

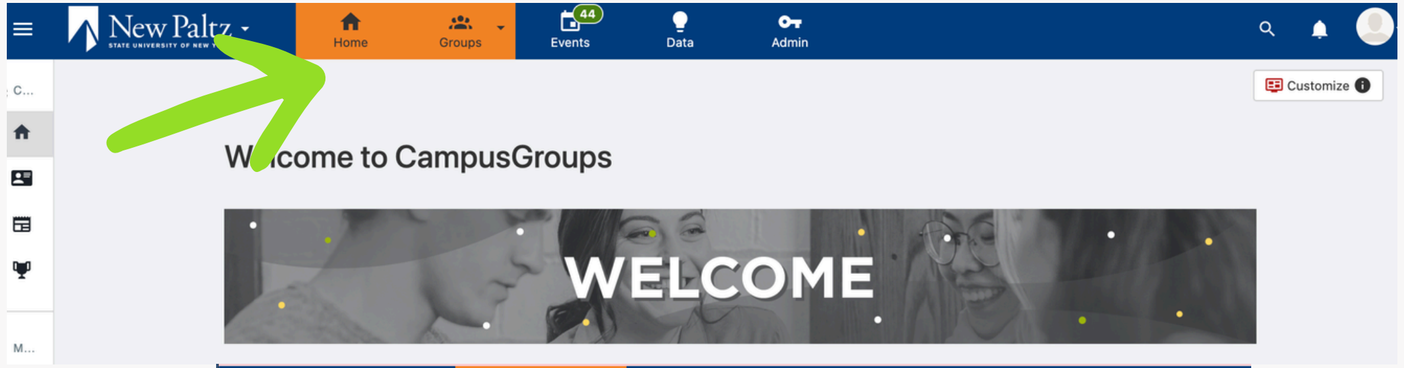


$150 max for student payments.

Yes, and no…

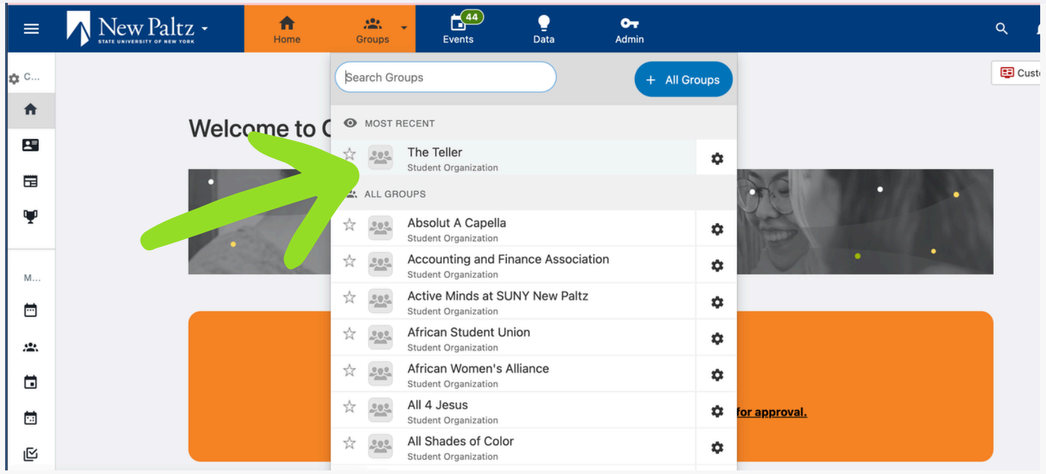
- Yes, if the student is NOT affiliated with your club but has experience providing a specific service.
- No, if you’re trying to pay someone in the club to provide a ‘professional service (like DJ or take photos, etc)

OUR NEW SPENDING PROCEDURES PLATFORM



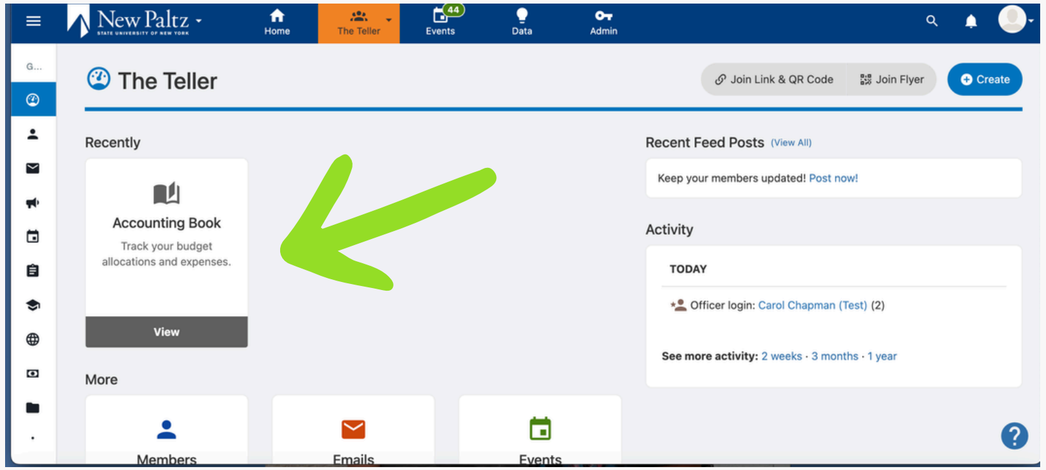
Treasurers ONLY

- The new engagement platform will ONLY allow the designated club treasurer access to the payment request button. Nobody else will see the button or be able to access funds.
- There can ONLY be one club treasurer identified in the system for each group.



Getting there

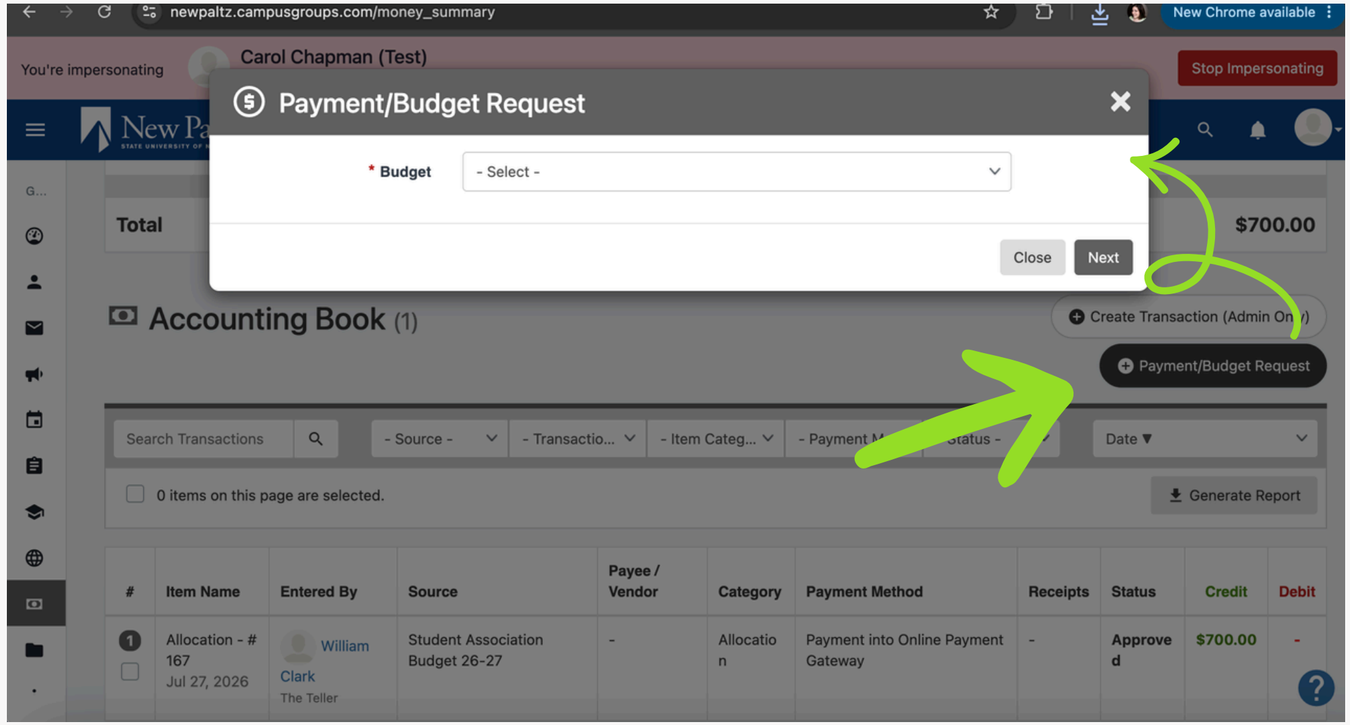
- Navigate to the club page (through the groups tab on the top)
- The page may look different depending on last login, but find the Accounting Book button and click on that.



OUR NEW SPENDING PROCEDURES PLATFORM

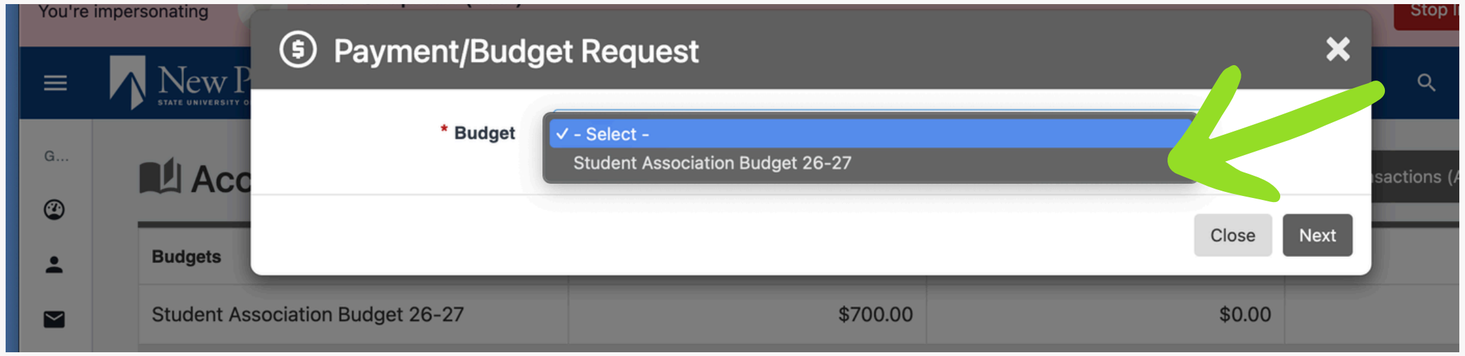
Purchase/Budget Request

- The purchase/budget request button will appear (for treasurers) in the Accounting Book, and once clicked on, will generate a pop-up to begin the process of requesting funds for club use.

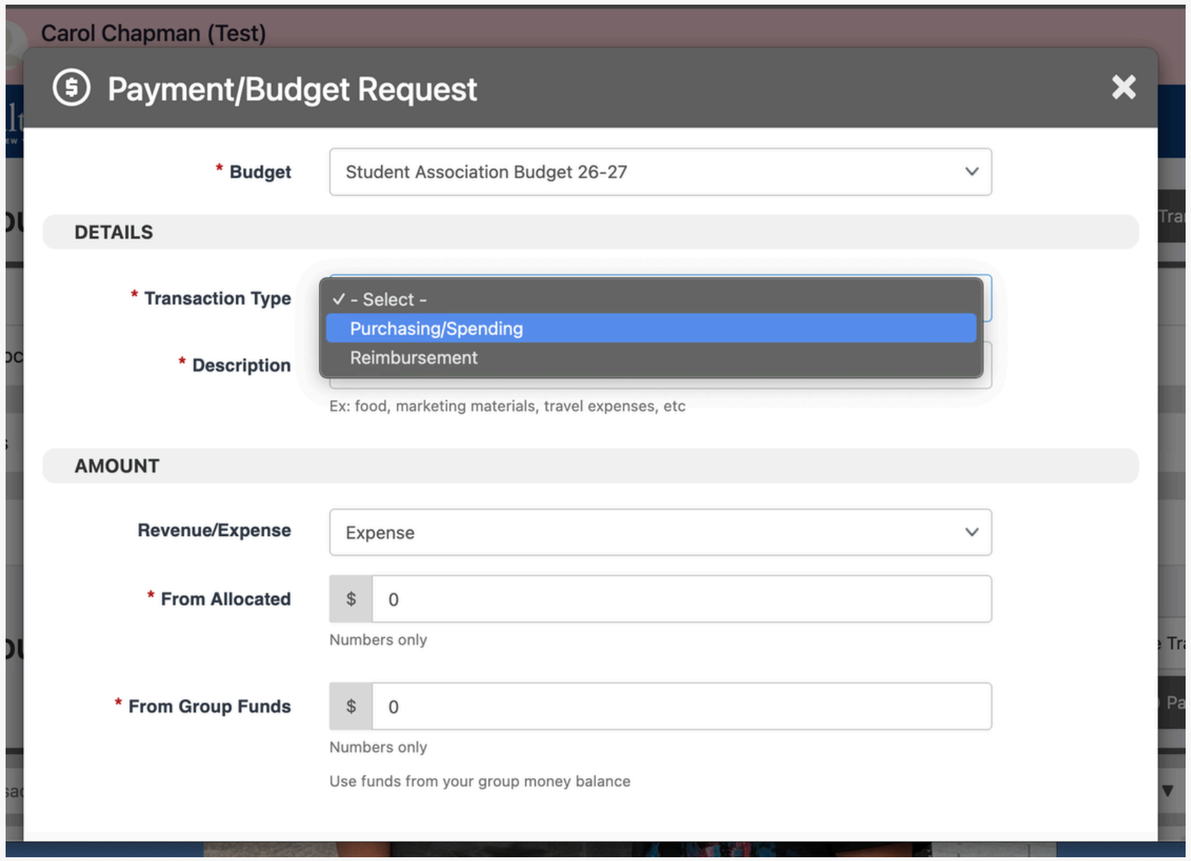


Completing the forms

- Treasurers will begin by identifying the budget that they are requesting to use from the dropdown.



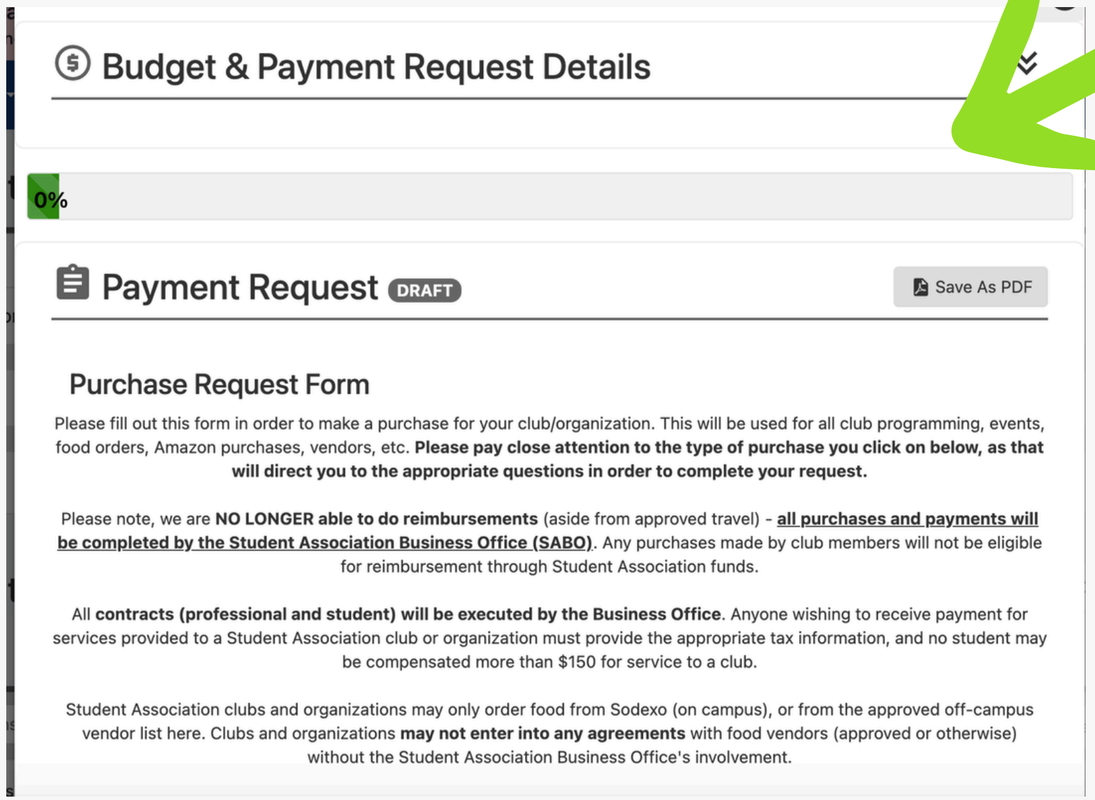
THE REQUEST



- ☑ Purchase/Spending (UNLESS TRAVEL)
- ☑ Put in a general description
- ☑ ALWAYS an expense
- ☑ Put the amount in 'From Allocated'
- ☐ Leave 'Group Funds' blank

NOW THE ACTUAL FORM LOADS

Students will need to read the information here and begin filling out the actual request below...



Budget & Payment Request Details

0%

Payment Request DRAFT

Save As PDF

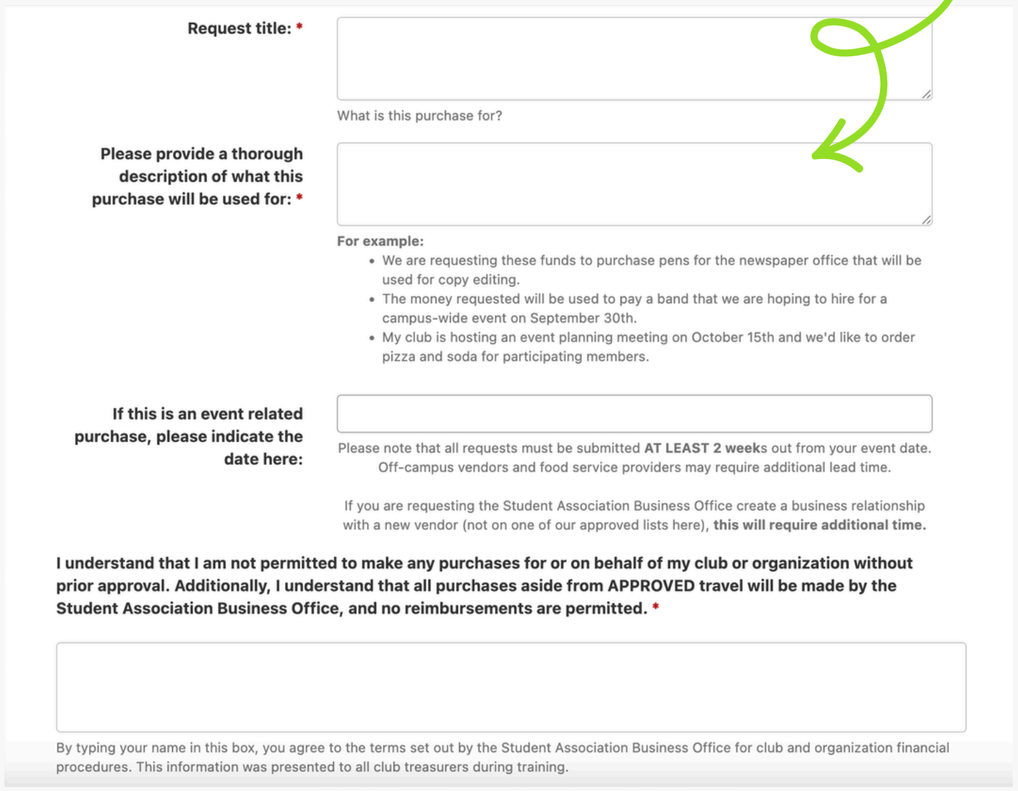
Purchase Request Form

Please fill out this form in order to make a purchase for your club/organization. This will be used for all club programming, events, food orders, Amazon purchases, vendors, etc. **Please pay close attention to the type of purchase you click on below, as that will direct you to the appropriate questions in order to complete your request.**

Please note, we are **NO LONGER able to do reimbursements** (aside from approved travel) - **all purchases and payments will be completed by the Student Association Business Office (SABO)**. Any purchases made by club members will not be eligible for reimbursement through Student Association funds.

All **contracts (professional and student) will be executed by the Business Office**. Anyone wishing to receive payment for services provided to a Student Association club or organization must provide the appropriate tax information, and no student may be compensated more than $150 for service to a club.

Student Association clubs and organizations may only order food from Sodexo (on campus), or from the approved off-campus vendor list here. Clubs and organizations **may not enter into any agreements** with food vendors (approved or otherwise) without the Student Association Business Office's involvement.



Request title: *

What is this purchase for?

Please provide a thorough description of what this purchase will be used for: *

For example:

- We are requesting these funds to purchase pens for the newspaper office that will be used for copy editing.
- The money requested will be used to pay a band that we are hoping to hire for a campus-wide event on September 30th.
- My club is hosting an event planning meeting on October 15th and we'd like to order pizza and soda for participating members.

If this is an event related purchase, please indicate the date here:

Please note that all requests must be submitted **AT LEAST 2 weeks** out from your event date. Off-campus vendors and food service providers may require additional lead time.

If you are requesting the Student Association Business Office create a business relationship with a new vendor (not on one of our approved lists here), **this will require additional time.**

I understand that I am not permitted to make any purchases for or on behalf of my club or organization without prior approval. Additionally, I understand that all purchases aside from APPROVED travel will be made by the Student Association Business Office, and no reimbursements are permitted. *

By typing your name in this box, you agree to the terms set out by the Student Association Business Office for club and organization financial procedures. This information was presented to all club treasurers during training.

LET'S START WITH AN AMAZON PURCHASE EXAMPLE!

SO WHERE CAN WE ORDER FROM?



npsa
NEW PALTZ STUDENT ASSOCIATION

SA CLUB & ORGANIZATION AMAZON ORDER FORM

Student Association Business Office (SABO)

14-DAY DEADLINE

Submit your Amazon Order Form **AT LEAST 14 DAYS (2 WEEKS)** before your event or need-by date. Late submissions may result in delays or items not arriving on time.

NO REIMBURSEMENTS

Students may not purchase Amazon items on behalf of a club and seek reimbursement. **All Amazon purchases must be made through this process.**

DELIVERED TO SABO

All orders will be shipped to the Student Association Office (SUB 210) for club pickup.

OVERVIEW

This form must be submitted as part of the purchase request process a MINIMUM of 2 weeks (14 days) ahead of the event. All Amazon purchases for SA registered clubs and organizations must be done through this process. No individual purchases/reimbursements are permitted.

SA will make ALL Amazon purchases and items will be delivered to the SA Office (SUB 210) for club pickup.



WHAT YOU'LL NEED TO SUBMIT

- A detailed list of items (can be an Amazon Wishlist link, if large order) that you will submit for the purchase request.

THE AMAZON ORDER PROCESS – STEP BY STEP

1. **COMPLETE THE FORM** — Fill out the Amazon Order Form as part of the purchase request process through the Student Engagement Platform.
2. **REVIEW YOUR ORDER** — Double-check item names, links, quantities, and pricing. Incomplete forms may cause delays.
3. **SUBMIT THE FORM** — Submit your form at least 14 days prior to your event or need-by date.
4. **SABO REVIEWS** — The SABO team reviews your request, verifies budget, and may contact you if a clarification is needed.
5. **ORDER APPROVED** — Once approved, SABO will place the Amazon order. You will receive a confirmation.
6. **ITEMS DELIVERED** — Items are shipped to the SA Office (SUB 210). SABO will notify you when your order arrives.
7. **PICK UP YOUR ORDER** — Club representatives may pick up items during normal business hours. Please bring ID.

CLUB OFFICER TIPS

- **Plan early!** Start your order request as soon as you know what you need.
- **Be specific!** Include exact item names, links, sizes, colors, and quantities.
- **Use a Wishlist for large orders.** Make sure it is set to "Public" or "Shareable via Link."
- **Check your budget.** All purchases must relate to your approved club budget or a club-run event.
- **Monitor your email for updates from SABO.**
- **Questions? Reach out early!**

FREQUENTLY ASKED QUESTIONS

Q: How far in advance should I submit my form?
A: At least 14 days (2 weeks) before your event or need-by date.

Q: Can I buy the items myself and get reimbursed?
A: No. Individual purchases and reimbursements are not permitted.

Q: What if an item is unavailable?
A: You can choose to allow substitutions or request that SABO check with you first.

Q: Can I submit a large order?
A: Yes! Submit a single Amazon Wishlist link instead of listing each item.

Q: What if the total cost is higher than my estimate?
A: SABO allows a price variance up to 20% above the total listed value when using the webpage, as long as it stays within your club's budget and the original intent.

IMPORTANT REMINDERS

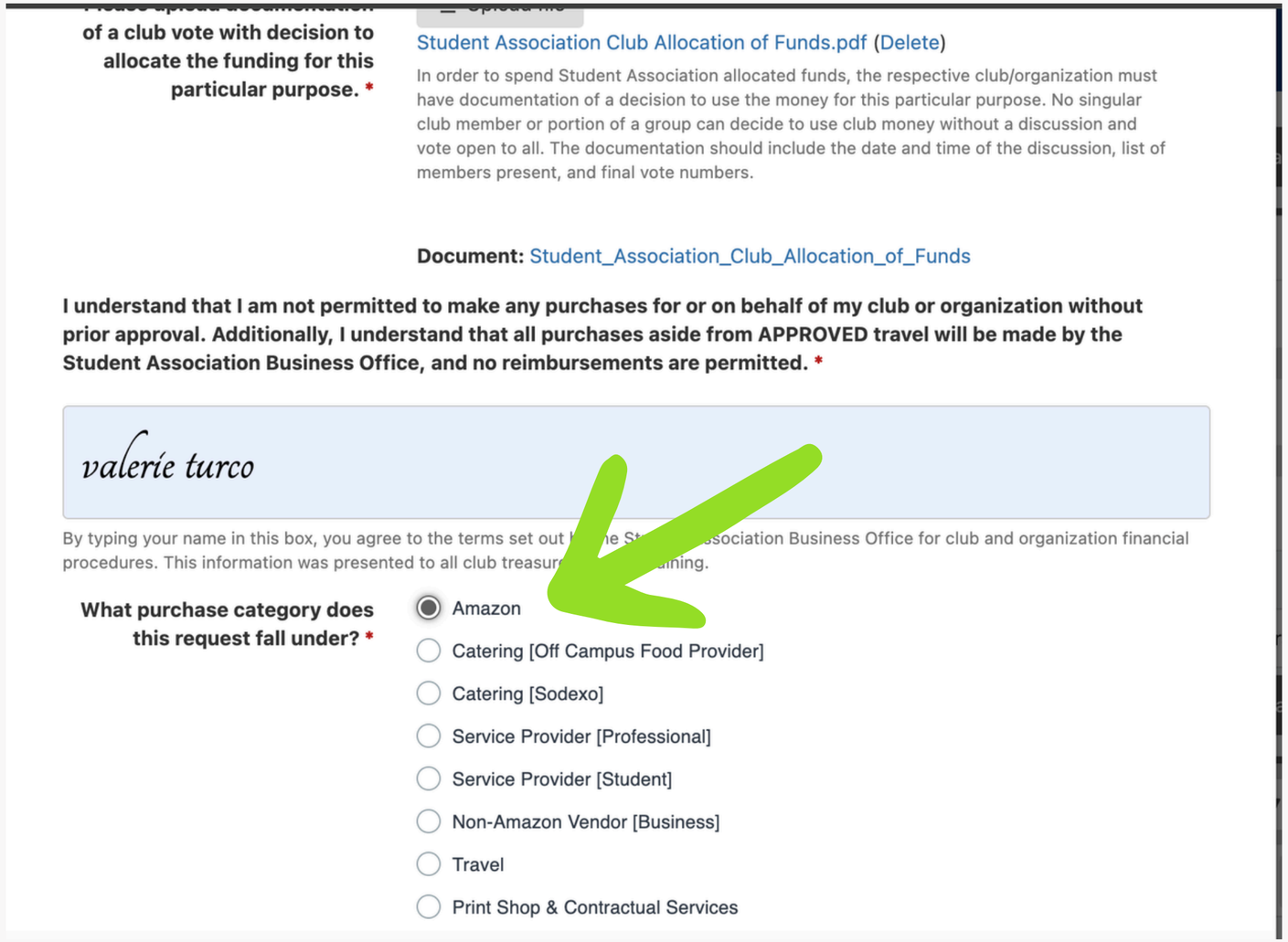
- All items must relate to your approved club budget, or be used for a club-run event.
- Submit your form at least 14 days prior to your event or need-by date.
- Incomplete forms or missing links may delay approval.
- Final purchase totals may vary slightly from estimates due to changes in price, availability, or substitutions.
- All purchases will be made through the Student Association Business Office.

NEED HELP? Student Association Business Office (SUB 210) | sabo@newpaltz.edu | newpaltz.edu/student-association

AMAZON

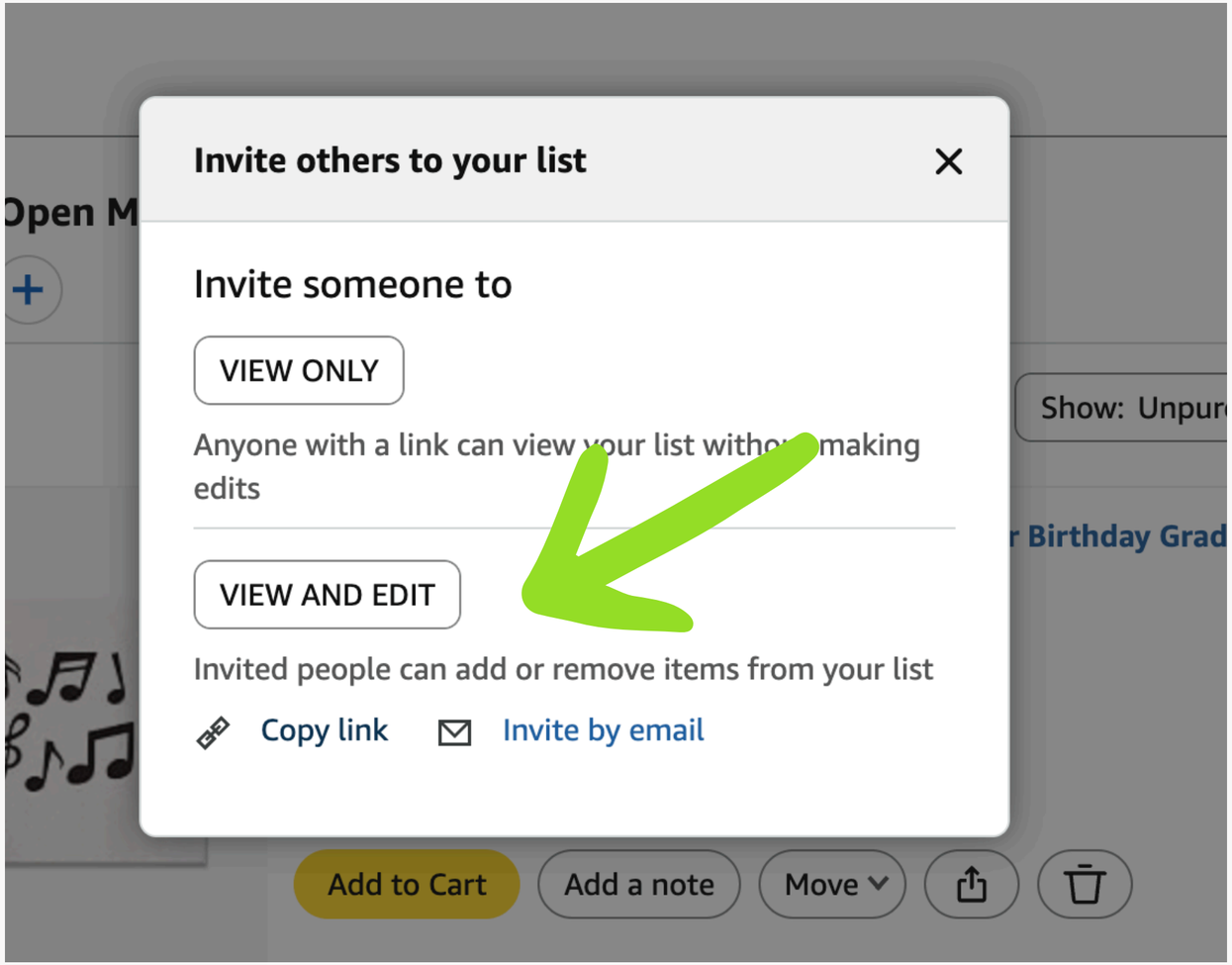
this example requires a link to an amazon wishlist or singular item link

selecting this option will open up questions that are specific to making an AMAZON PURCHASE



AMAZON PRO-TIP

when you share the wishlist with us, use the 'view and edit' options so we can make modifications if necessary. this way, we can update the list so you'll be able to see exactly what we ordered!

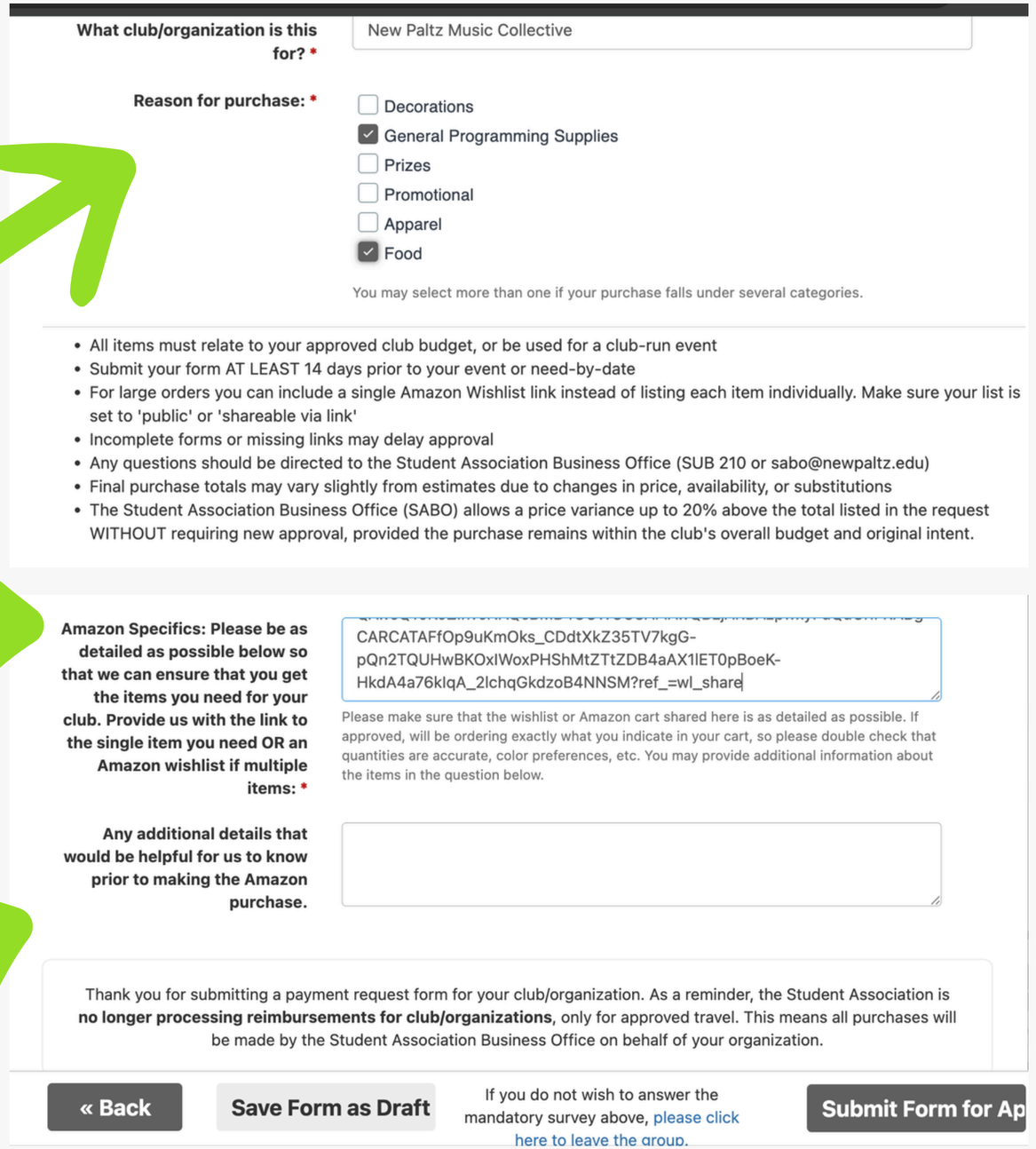


AMAZON

give us an idea of what the items are for here

then link the wishlist here

provide any important specifics here (colors, subsitutions if needed)



WHAT IF WE WANT TO PRINT ON CAMPUS?

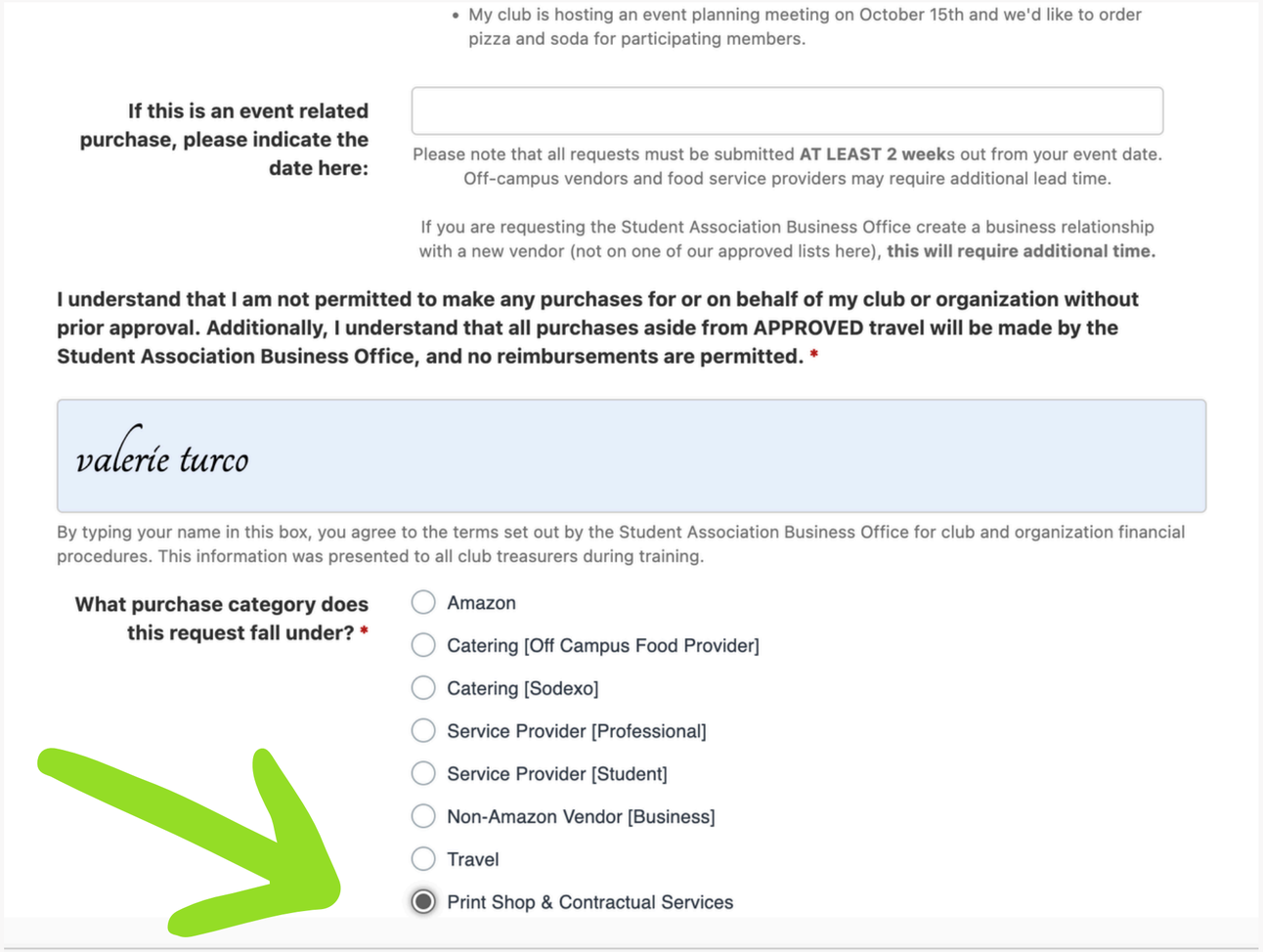
no problem! we have a print shop!



PRINT SHOP

this example requires a QUOTE from the campus print shop

selecting this option will open up questions that are specific to uploading that quote (or contractual services which only apply to certain clubs)

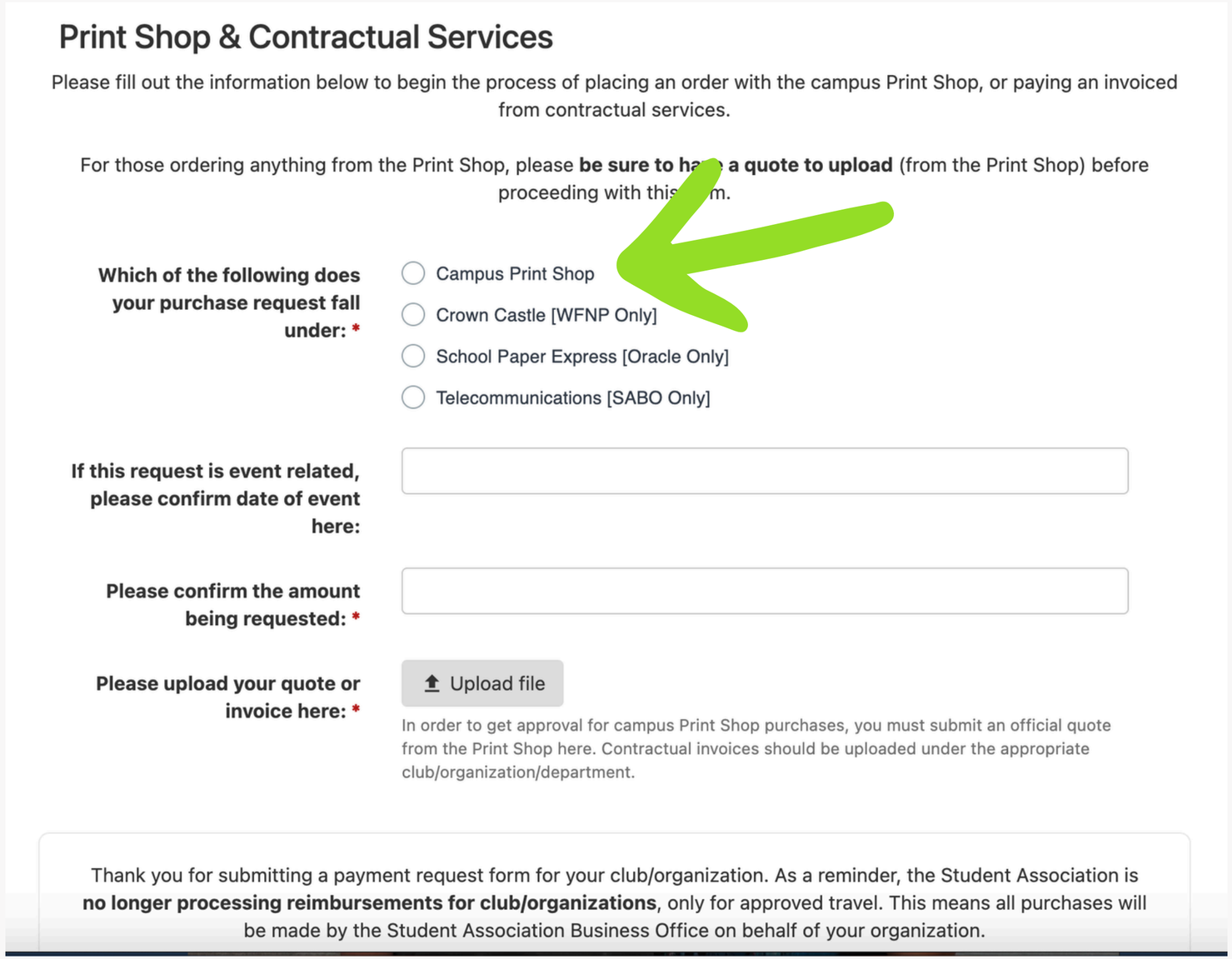


PRINT SHOP

the student will then follow the prompts and complete the form

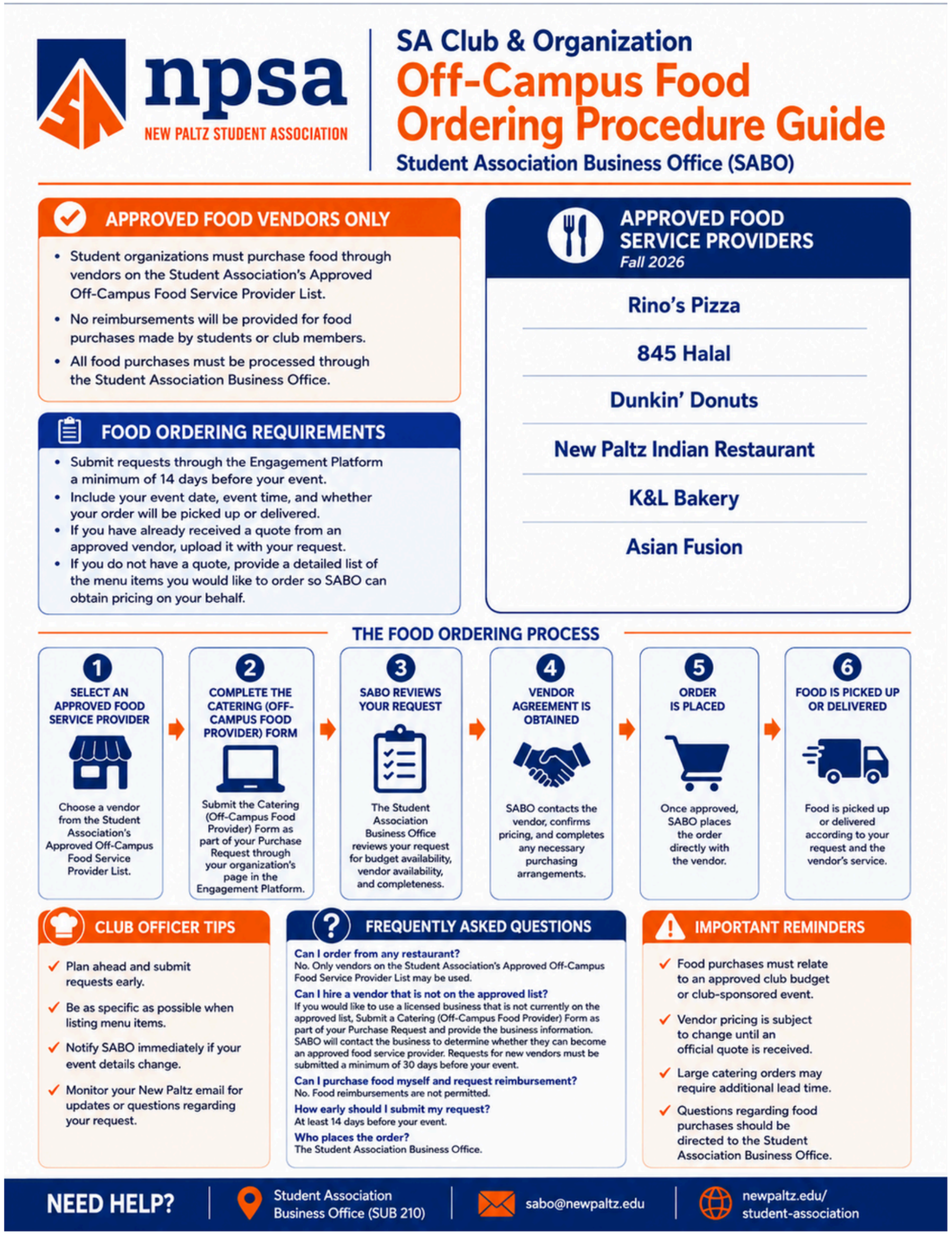
uploading documentation for anything other than these 4 options would prompt a rejection of the request

you can go BACK in the form (or save as draft)



FOOD - 2 OPTIONS: SODEXO OR APPROVED OFF-CAMPUS VENDORS

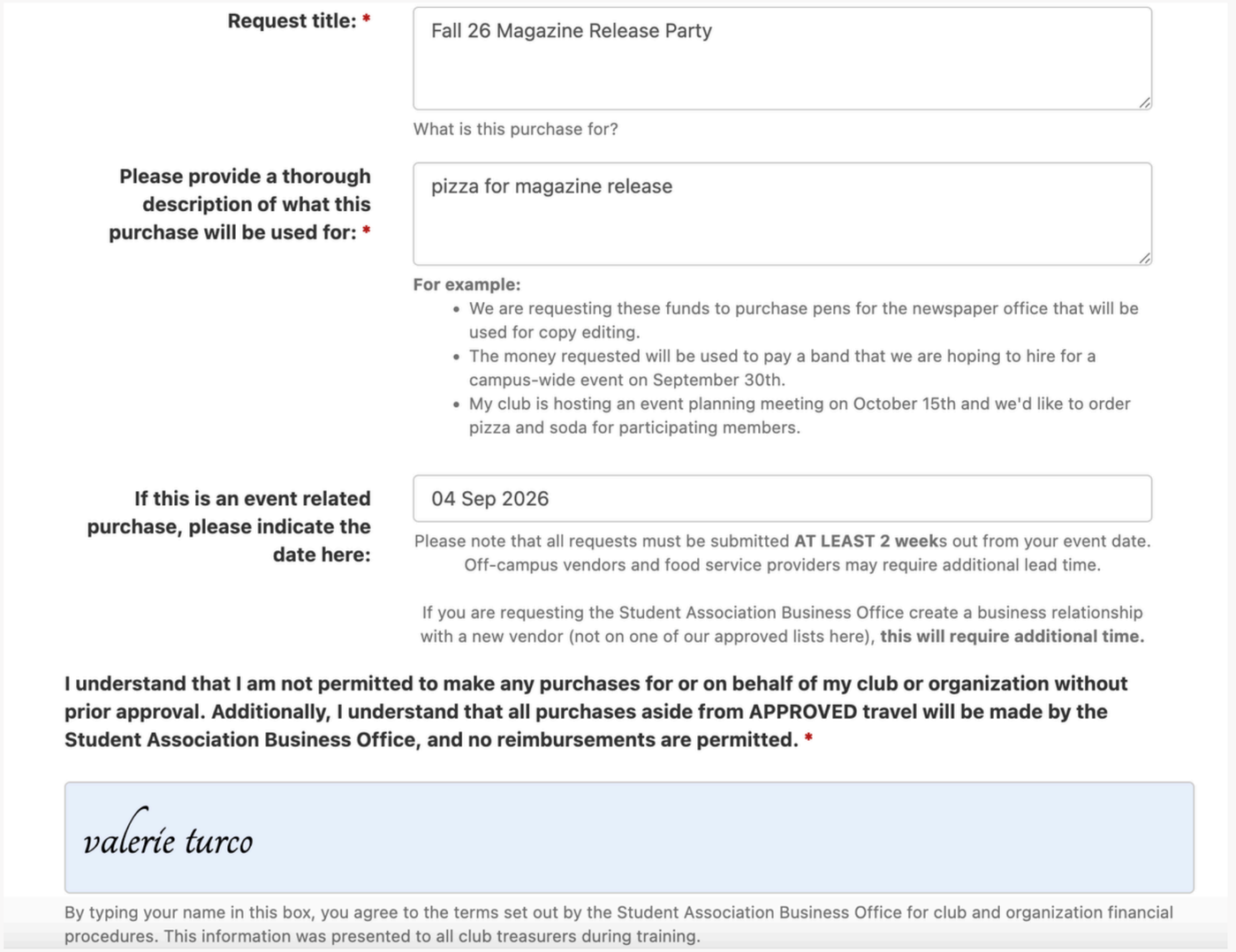




FOOD

this example requires a QUOTE from an approved food-service vendor

selecting this option will open up questions that are specific to uploading that quote, a screenshot, or, asking us to consider vetting a new restaurant



Request title: *

Fall 26 Magazine Release Party

What is this purchase for?

Please provide a thorough description of what this purchase will be used for: *

pizza for magazine release

For example:

- We are requesting these funds to purchase pens for the newspaper office that will be used for copy editing.
- The money requested will be used to pay a band that we are hoping to hire for a campus-wide event on September 30th.
- My club is hosting an event planning meeting on October 15th and we'd like to order pizza and soda for participating members.

If this is an event related purchase, please indicate the date here:

04 Sep 2026

Please note that all requests must be submitted **AT LEAST 2 week**s out from your event date. Off-campus vendors and food service providers may require additional lead time.

If you are requesting the Student Association Business Office create a business relationship with a new vendor (not on one of our approved lists here), **this will require additional time.**

I understand that I am not permitted to make any purchases for or on behalf of my club or organization without prior approval. Additionally, I understand that all purchases aside from APPROVED travel will be made by the Student Association Business Office, and no reimbursements are permitted. *

valerie turco

By typing your name in this box, you agree to the terms set out by the Student Association Business Office for club and organization financial procedures. This information was presented to all club treasurers during training.

FOOD

Payment Request DRAFT

Save As PDF

Catering [Off Campus Food Provider]

Please fill out the information below to begin the process of contracting with an off-campus food service provider. The Student Association Business Office will then reach out with our required contract and begin the process of executing the contract with the vendor. You will be provided with updates via your request and your @newpaltz.edu email account.

NOTE: You may not enter into any agreement with a food service provider on behalf of a club. Other than getting a quote or inquiring about ability to provide your desired food order on a specific day, all logisitics will be taken care of by the Business Office.

Requests for off-campus food service vendors must be submitted **AT LEAST 14 DAYS** in advance of your event date to ensure there is enough time to coordinate ordering, payments and so on.

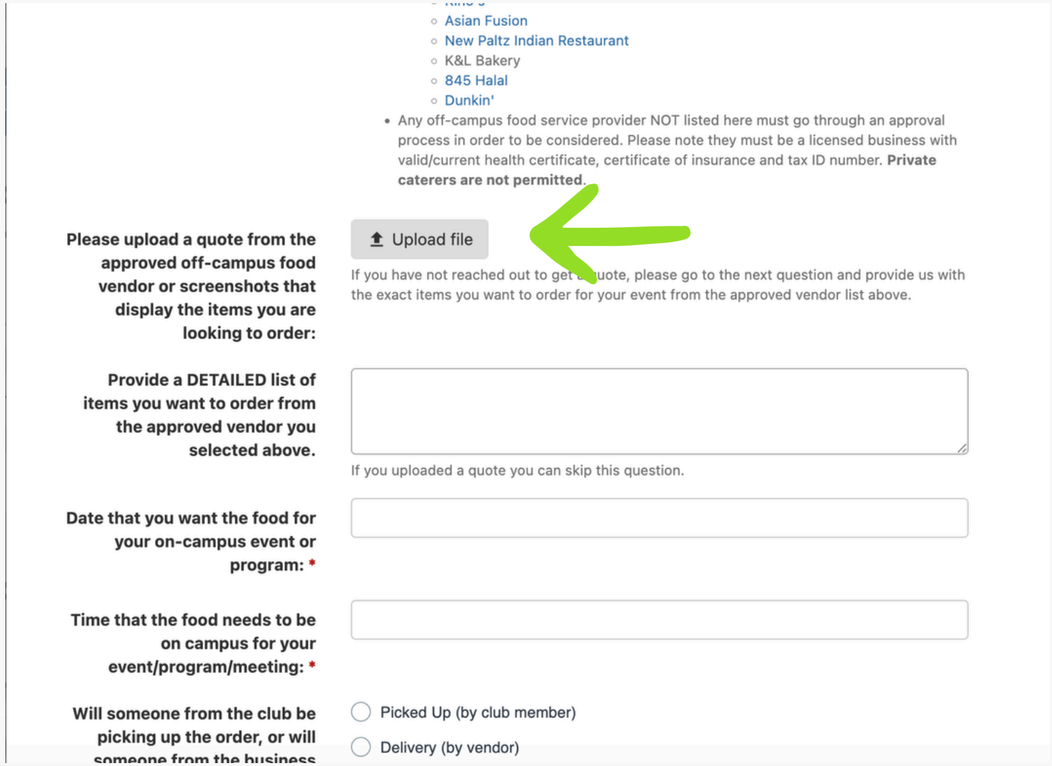
If there is a vendor that is NOT listed here but you wish to explore an official, vetted partnership between them and the Student Association, please allow **AT LEAST 30 DAYS**. This **does not guarantee** our ability to place an order with this food service provider, as the Business Office will need time to ensure the bu ess is licensed d able to accept our payment terms.

What approved off campus food service provider are you requesting to order from? *

- ○ Rino's Pizza
- ○ K&L Bakery
- ○ 845 Halal
- ○ New Paltz Indian Restaurant
- ○ Asian Fusion
- ○ Dunkin' Donuts
- ○ I have a licensed food vendor not listed here I would like to get vetted.

FOOD





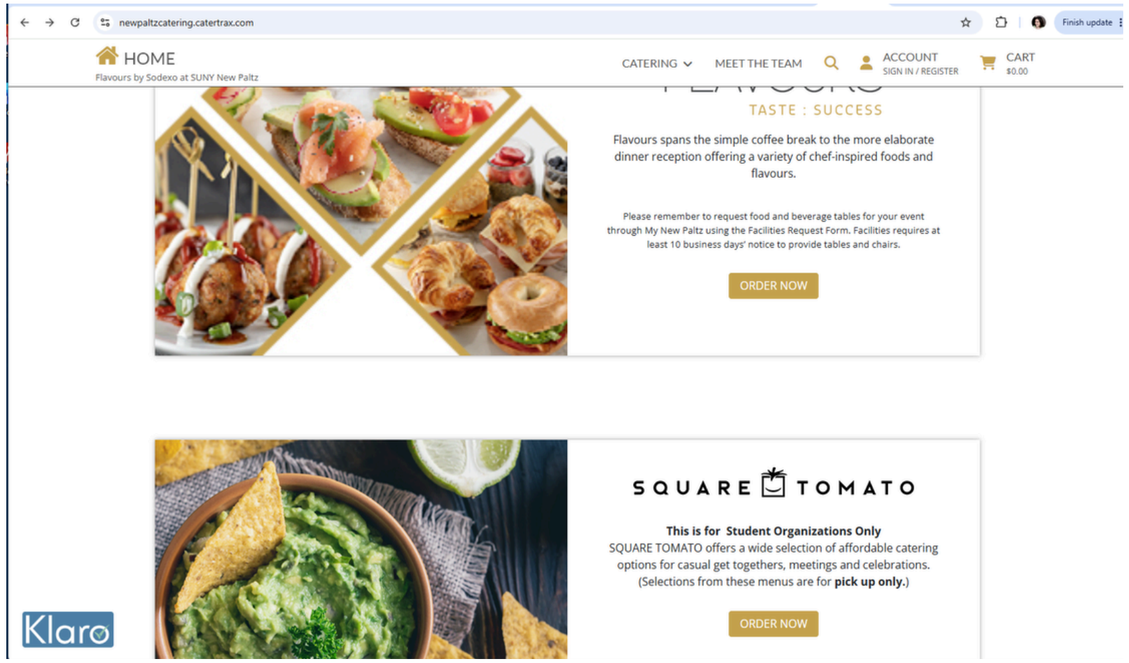
you tell us what you want
we place the order
it gets delivered OR you pick up
we pay the bill

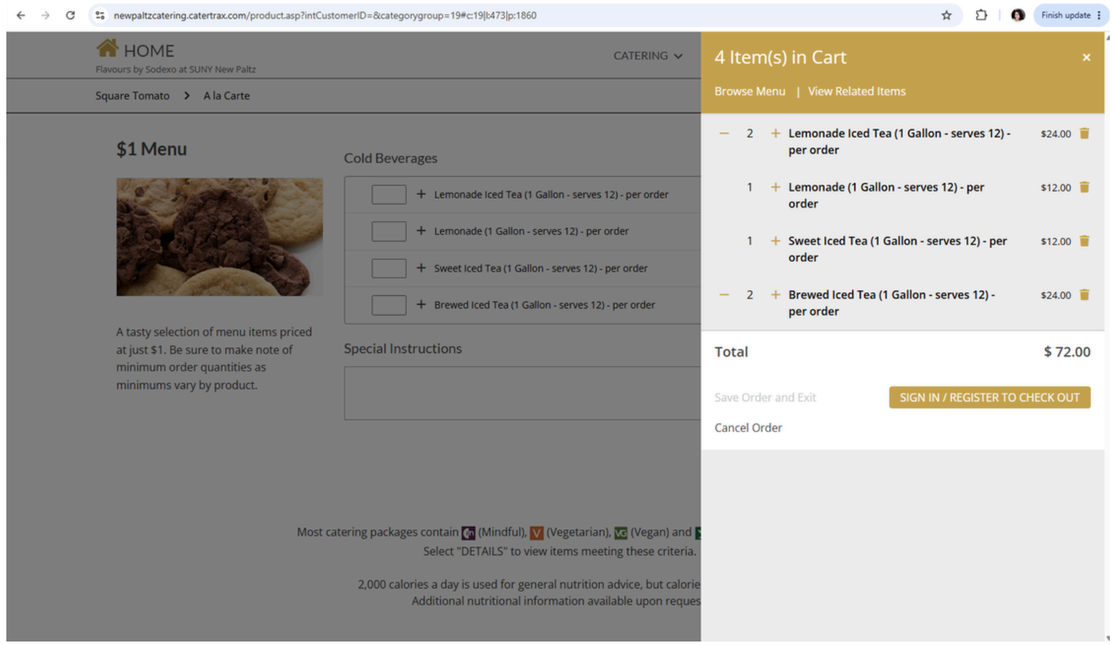
SODEXO

this example will require a QUOTE from our Sodexo services on campus

selecting this option will promt you to upload a quote OR a list of items from the Sodexo catering site that you want to order







TRAVEL

Fac/Staff NAB Proposed Expenses
https://www.beaweb.org/conv/

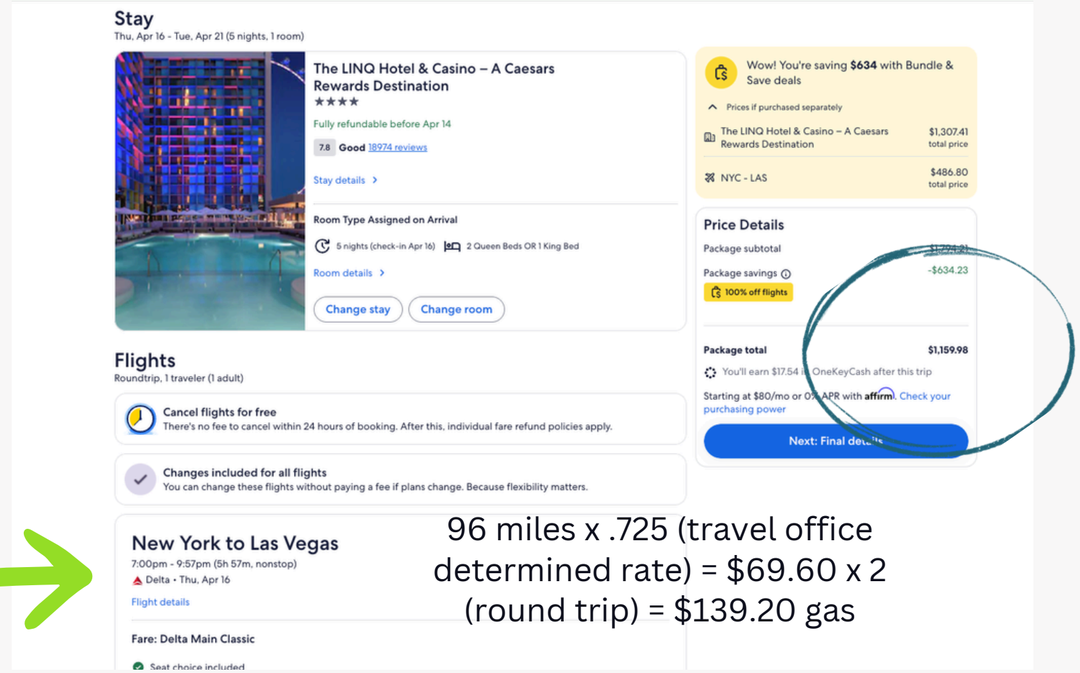
Total Funds Requested: $1560 (MAX)
Breakdown:

- **Hotel/Flight: $ 950MAX**
- **Conference Registration: $245**
- **Airport parking: $150 MAX**
- **Gas mileage: $139.20 MAX**
- **Travel to/from airport to hotel in LV: $50-$75 round trip**

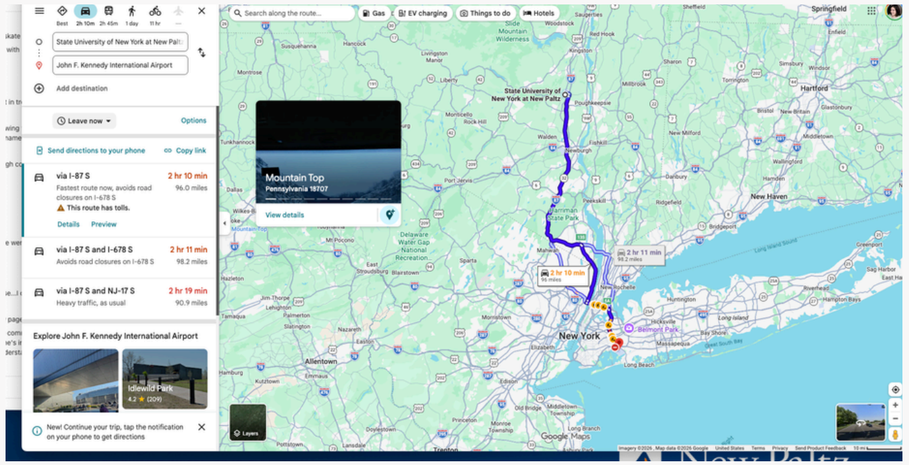
Student NAB Proposed Expenses
https://www.beaweb.org/conv/

Total Funds Requested: $1590 (MAX)
Breakdown:

- **Hotel/Flight: $1200 MAX**
- **Conference Registration: WAIVED**
- **Airport parking: $175 MAX depending on lot selected**
- **Travel to/from airport to hotel in LV: $50-$75 round trip**
- **Gas mileage: $139.20**



96 miles x .725 (travel office determined rate) = $69.60 x 2 (round trip) = $139.20 gas



screenshots of all associated travel costs (registration, transportation, hotel, etc)

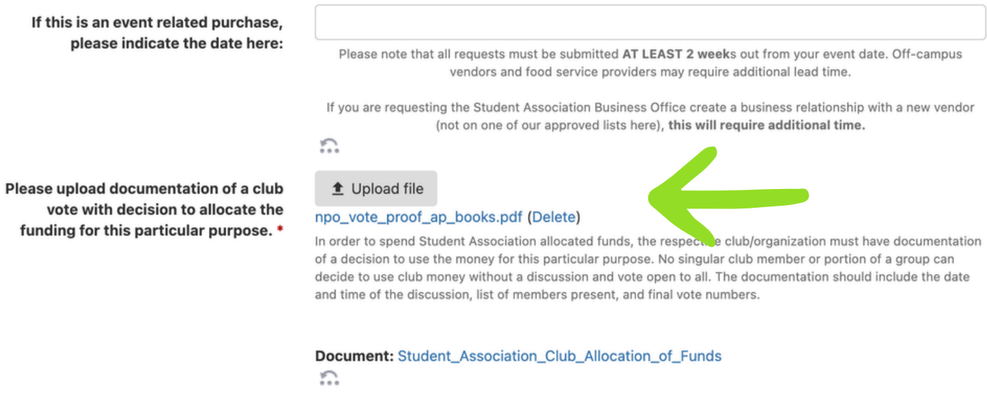
travel roster

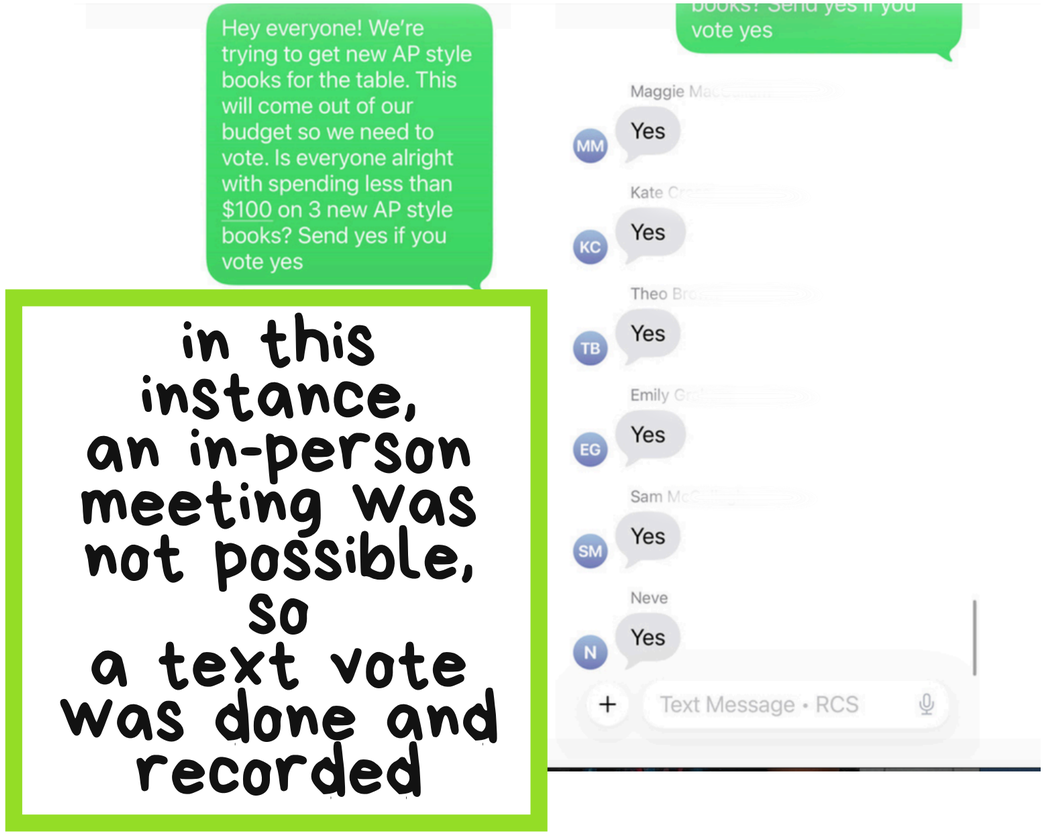
NEW NEW NEW

ALL spending by SA clubs and organizations requires a discussion (whether during an eboard meeting, general club meeting, or virutal chat) and a vote.

This ensures that everyone is on the same page about allocating funds for a specific purpose and that spending has been discussed by club members

There is a sample document that can be used to record votes embedded in the purchase request form.





SO, TO RECAP...

05 reimbursements

Unless someone from the club has been approved for travel, there will be no out of pocket spending or reimbursements via SA!

04 receipts

This means a culture change with planning for spending, BUT, no need to worry about turning in recepts and waiting for a check!

03 vendors

We have an approved vendor list for students to pick from (established professional vendors who accept our terms).Adding vendors is an option, but will take time and some planning.

02 contracts

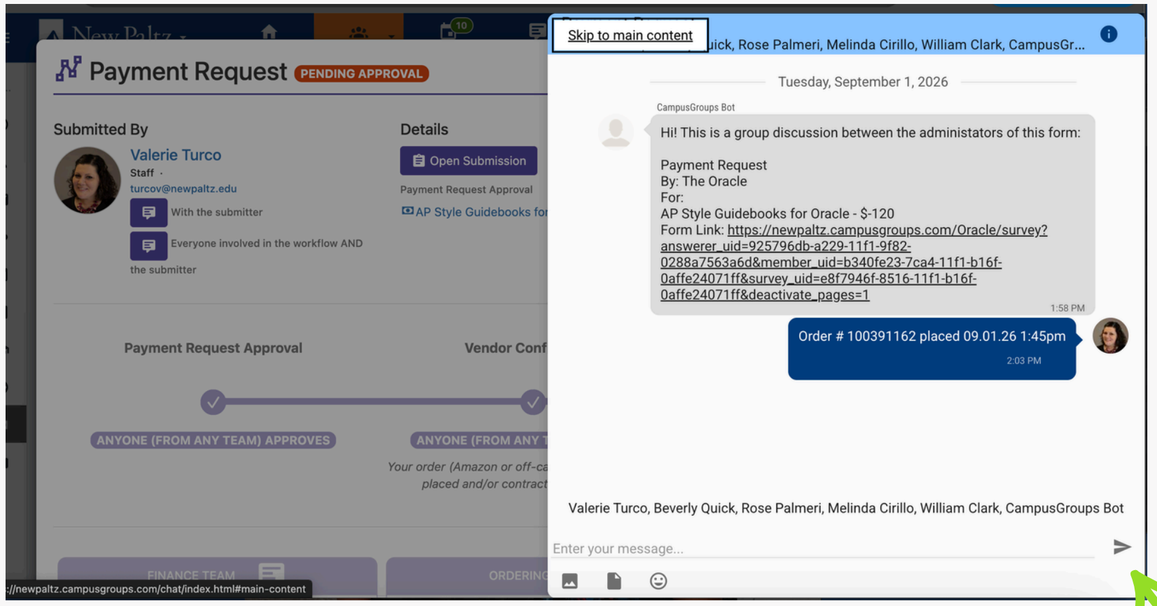
Professional vs. student contracts. SABO establishing contract terms. No student payments over $150.

01 food

Sodexo vs. off-campus APPROVED vendors. All coordination completed by SABO.

BIG CHANGES, BUT WILL MAKE FOR MUCH EASIER FINANCIAL EXPERIENCE

PRO TIPS FOR EASY APPROVALS



- submit early and with all required documentation
- minutes or proof of vote is required to spend club funds. you must submit an actual record of a vote or discussion to spend money
- you can now save your submission as a draft and go back to it before submitting
- use the chat feature to let us know of any changes to the submission or to ask any questions. you'll also be updated via the chat as your request moves through the stages of the request process.

WANT TO LEARN MORE ABOUT FUNDRAISING?



Let’s chat!
Email Val:
turcov@newpaltz.edu
to set up a time to meet
and go over
SNAP! Raise fundraising

and remember, money raised goes to your club, not a charity or foundation

NEED MORE HELP?

npsa
NEW PALTZ STUDENT ASSOCIATION

CLUB AND ORGANIZATION ASSISTANCE

THURSDAY 9.3	1PM-3PM
TUESDAY 9.8	10AM-12PM
WEDNESDAY 9.9	4PM-6PM
FRIDAY 9.11	11AM-1PM

MEMBERS OF THE STUDENT ASSOCIATION AND CENTER FOR STUDENT ENGAGEMENT STAFF WILL BE AVAILABLE IN SUB 62/63 DURING THESE TIMES TO HELP CLUBS 1:1 WITH ROOM REGISTRATION, EVENT SUBMISSIONS AND THE FINANCE PROCESS FOR CLUBS AND ORGS!

IN CASE YOU DIDN'T TELL US YOU ARE A TREASURER

ONE treasurer per organization...
ONLY the treasurer can submit purchase requests

https://forms.cloud.microsoft/r/1jyjzdnPtv

Student Association
Business Office

SUB 210
SABO@newpaltz.edu
Mon-Fri 8:30am-5pm

npsa
NEW PALTZ STUDENT ASSOCIATION