Harvard Undergraduate Association Finance Guidelines

Fiscal Year 2025-2026

Since the Harvard Undergraduate Association (HUA) Grants Fund is drawn solely from the Student Activities Fee (SAF), a voluntary contribution made by Harvard College students, funding is **strictly intended to directly fund student organizations to support student life activities and operations for all Harvard College students**. The Finance Team has adopted the following guidelines to facilitate these goals while maintaining fiscal responsibility.

The HUA Finance Guidelines act as the primary source of guidance and information for HUA grants, including **eligibility, application process, allocation policies, disbursement process, appeals,** and **receipt submissions**. If there is any incorrect or inconsistent information, please contact the HUA Co-Treasurers at **treasurer@thehua.org**.

The Harvard Undergraduate Association Finance Guidelines were brought to a vote to the HUA Finance Team as of 9/17/2025 and was with a 2-0-0 vote.

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Recent Changes

The third edition of the Harvard Undergraduate Association Finance Guidelines representing the 2025-2026 Fiscal Year has numerous changes which include, but are not limited to:

1) Updated compliance reconciliation guidelines and penalties in line with an increased trend of receipt noncompliance.
2) Added guidelines and penalties for randomized audits of printing material.
3) Removed guidance for monthly grant cycles.

Disclaimer

The Harvard Undergraduate Association (HUA) allocates funds to various student organizations and activities that enhance the academic, extracurricular, and social experience of the students. However, the HUA does not endorse any events or actions funded by the HUA. **The HUA is not liable or responsible for any consequences or damages that may arise from such events or actions.** The HUA encourages all students to exercise their own judgment and discretion when participating in or organizing any events or actions that are funded by the HUA. The finance team and the HUA consider only application material and standing with the DSO Therefore, our funding decisions have nothing to do with world or campus politics, and decisions of the finance team reflect neither the personal opinion of the finance team members nor of anyone inside the HUA.

Grant Eligibility

Eligibility Requirements

Officially recognized student organizations in **good standing** with the Dean of Students Office (DSO) are eligible to apply for HUA grants on a semesterly and monthly basis. To be eligible to apply for an HUA grant, student organizations must meet the following criteria:

1. Student organizations that practice exclusion (e.g. *a student organization where comping is not open to all undergraduates of Harvard College*) will not be funded by the Harvard Undergraduate Association, with the exception of organizations that uplift minority and underrepresented.
2. Funding will only be available to student organizations that do not require their members to pay any kind of fees or dues to participate as part of the club or club sport (unless full no questions asked financial aid is available).
3. The HUA Finance Team reserves the right to deny grant applications with large annual revenue sources in favor of funding student organizations without substantial financial resources. In our process, we have to recognize that some clubs have greater resources than others, especially because we are constrained with so little funding on a comparatively huge amount of funds requested. In every case, we will make a distinct decision considering all the circumstances to make this process as fair as possible.
4. Student organizations must be in compliance with HUA Finance policies which includes receipts compliance. Additional compliance criteria may exist including conditions stipulated by relevant audit sanctions.

Additionally, the funding towards projects, events, or general expenses must:

1. **Take place after the Leader Forum and before the last day of reading period, inclusive.** Social events must take place after the Leader Forum and before the first day of reading period in order to receive funding. Events occurring during the summer or winter break are **not** eligible. For specific dates, reference the **Harvard FAS Calendar**. This requirement has been imposed by the DSO.

2. **Acknowledge HUA support** on programs, posters, and at least one place within the event space if programs or posters are not on display (for example, on a banner or at a table). **"Funded by the HUA with your Student Activities Fee"** should be written on these materials along with the **HUA logo**, which is available on the HUA website (**Resources/HUA Logos**). Since we have seen various violations of this policy in the past, we reserve the right to audit this in the future and sanction clubs with budget cuts or receipt non-compliance if they don't comply with this rule.

3. **Declare how much funding is coming from sources outside of Harvard College.** It is an expectation that all outside funding will be used for events before requests for funding from the HUA. **Any inaccurate disclosures or nondisclosures of outside funding will result in disqualification from future**

funding or in sanctions. The assisting independent reviewer has experience in flagging clubs that don't comply with this policy. Please consider thoroughly to make sure that you declare outside-funding to the best of your knowledge. In-kind donations of material goods to be used by the organization do not apply.

4. **Be content-appropriate.** The HUA seeks to be an organization that welcomes and accepts all Harvard College students, regardless of their background. In order to maintain that culture, **HUA grants will not fund content that is deemed racist, xenophobic, sexist, ableist, homophobic, or otherwise culturally insensitive.** The HUA reserves the right to revoke funding from projects deemed to fall under any of these categories by a supermajority vote (2/3) of all present Finance Team members or by the convening of a Problem-Solving Team.

5. **Submit reimbursement (retroactive) requests as soon as possible** (via the soonest funding cycle following the event). The HUA encourages student organizations to submit the receipts as soon as possible in order to maximize the amount of funding your event can receive. Retroactive grant applications must be submitted by the last grant application of the semester to be eligible for funding. It's important to note that **retroactive funding is not guaranteed** depending on the volume of funding requests that come in that month and thus student organizations should not depend on it in order to host events. We will make every effort to fulfill and accommodate the highest amount possible of retroactive funding requests that we receive. **Only retroactive requests in the current funding cycle are eligible for reimbursement.**

6. **Be able to produce itemized receipts.** In response to Risk Management and Audit Services' recommendations, **the HUA will NOT fund any events/organizations that cannot provide receipts.** Inability to provide receipts in a timely manner means that unaccounted funds must be returned completely or clubs risk being flagged and disqualified for future club funding cycles. With the addition of an independent grant reviewer, the HUA will now audit 100% of clubs each cycle.

7. An independent grant reviewer will audit most of the club's receipts. This additional resource of the DSO enables us to comply almost fully with the mentioned recommendations. Inability to provide receipts in a timely manner means that unaccounted funds must be returned completely or clubs risk being flagged and disqualified for future club funding cycles. While in the past, we only had the resources to audit about 10-20% of clubs' receipts, the finance team will now aim to audit 100% of the clubs for every cycle.

Student Organization Eligibility

While officially recognized student organizations in good standing with the Dean of Students Office (DSO) are eligible for HUA grant funding, some additional requirements are imposed in order to maximize the utility of SAF funds to student organizations. For a complete list of student organizations and their classifications, visit the **SOCO Groups** list.

Independent Student Organizations (ISO)

ISOs compose the largest classification of recognized student organizations. ISOs in good standing with the DSO and compliance with the HUA's receipt are eligible for HUA grant funding. **The HUA places no restrictions on ISOs applying for HUA grant funding**, beyond the general requirements.

Recognized Social Organizations (RSO)

RSOs are not eligible for HUA grant funding. RSOs are provided alternative funding routes through the DSO and are encouraged to reach out to the DSO to start this process at the beginning of each semester. For more information on RSOs and a complete list, please visit the DSO's Recognized Student Organization **website**. Please reach out to **treasurer@thehua.org** if you need help facilitating this process.

Phillips Brooks House Association (PBHA)

PBHA grant eligibility is outlined in the Official HUA Constitution and Bylaws. The PBHA Grant Agreement stipulates that as PBHA contains over 70 organizations, **PBHA will be guaranteed $35,000.00 in funding per year**, split evenly among semester grants with immunity from funding cuts. Funding beyond $35,000.00 is subject to funding cuts. This agreement is contingent upon sufficiently completing the grant applications along with the submission of receipts for expenses in accordance with the HUA Receipt Compliance policies. **The HUA prohibits individual PBHA programs from applying for HUA grant funding.**

Department Sponsored Student Organizations (DSSO)

DSSOs are student organizations sponsored by a Harvard Department or Office. **The HUA places no restrictions on DSSOs applying for HUA grant funding,** beyond the general requirements. Since sponsoring departments may impose financial oversight, DSSOs should ask their sponsoring department if they are eligible for HUA grant funding.

Club Sports

Club Sports are student organizations sponsored by the Harvard Department of Athletics. **The HUA no longer imposes maximum funding limits on Club Sports.** The HUA will collaborate with the Harvard Department of Athletics to determine the final eligible request for Club Sports. **Please do not use any projections of funding from the Harvard Department of Athletics when stating your outside funding.** The HUA Finance Team will calculate this on your behalf.

All Club Sports are expected to apply for Harvard Department of Athletics funding. Please contact Alex Carras at **alexander_carras@fas.harvard.edu** to facilitate this process.

Failure to apply for Harvard Department of Athletics funding will result in deductions from the HUA-eligible funding request.

Provisionally Recognized Student Organizations

Provisionally recognized student organizations have not yet been officially recognized by the DSO, yet have obtained provisional status from the DSO to conduct events or other activities. **The HUA restricts provisionally recognized student organizations to emergency funding only.** Please declare that you are a Provisionally Recognized Student Organization within your emergency fund application if you wish to apply.

Direct SAF Beneficiaries

Any student organization that is the **direct recipient of SAF funds** as determined by the Student Activity Fee Advisory Committee (SAFAC) is **not eligible** for HUA grant funding.

Application Process

Evidence of dishonesty when applying or interviewing for a grant are grounds for disqualification of a student group from receiving future funding from the HUA. All sources of revenue must be reported to the Finance Team, and all expenditures must be documented with receipts. As treasurers, we are here to help and offer training as well as office hours to help all student organizations succeed.

Process Designation

HUA grant funding consists of one cycle every semester, known as semesterly grant funding.

Student organizations intending to apply for semesterly grant funding should be prepared with their event plans for the upcoming semester.

We will continue to offer funding in emergency situations, on a rolling basis, throughout the semester. You must state the emergency situation, the unforeseen expense, or extraordinary circumstances to be successful in an application through the emergency grant funding. Please note that this **is not replacing Monthly grants** but really is only a source of funding in an emergency. Your student organization should plan to utilize the semesterly grant funding cycle to procure funding. **The HUA restricts student organizations from applying for Semesterly and Emergency grant funding simultaneously.** For example, you cannot submit a Fall 2025 Semesterly grant application and an emergency grant application within a month of the deadline for the Semesterly grant application.

The HUA Finance Team highly recommends student organizations to apply for Semesterly grant funding as that is where the **vast majority** of the budget for grant funding is dedicated. **Emergency grant funding is only reserved for emergency, unforeseen expenses, and provisionally approved student organizations,** which reflects a much smaller budget in comparison to Semesterly grant funding. It also reflects a much smaller budget compared to the pre-existing Monthly grant funding. **Do not rely on Emergency funds** even if you used to make a lot of use of the Monthly grant cycles.

Semesterly Grants

As an officially recognized student organization by the Dean of Students Office (**excluding provisionally recognized student organizations**), the application and allocation process for semesterly grants is described as below.

For **step-by-step instructions**, please visit the HUA **Grant Application** website page or participate in one of our walk-through meetings.

1. The semesterly grant application must be submitted using the Finance Team's **Semesterly Grant Application Form** with the uploaded **Grant Supplement**. All applications must be submitted as listed under the Grant Cycle Timeline section for the respective semester. It is the responsibility of the student organization to ensure that they submit the application sufficiently and by the deadline. **Under no circumstances will late submissions be considered for review by the Finance Team.**

2. After your grant application is submitted, the Finance Team will check the student organization's eligibility regarding HUA receipt compliance, audit sanctions, and DSO status. Next, a Finance Team representative will be assigned to review your grant application case. The DSO-funded independent grant reviewer will handle the majority of the cases on our behalf and according to the policies in this guide. We are dedicated to having every case briefly checked by a finance team member for accuracy after the independent reviewer gave a recommendation. If you believe there is key information missing in your application, you can schedule an interview with the Co-Treasurers. In most cases, there is absolutely no need to schedule an interview at this stage. The finance team reserves the right to schedule an interview with you.

3. At this stage, your application was reviewed by our independent grant reviewer and briefly revised by one of the members of our finance team.. This initial recommendation will be sent out to all Finance Team representatives who will vote and discuss your final funding recommendation.

4. The final funding decision will be emailed to the respective student organization contact no later than **exactly two weeks following the due date of the application (unless otherwise communicated).** Your reviewed application with changes will be returned for your records. If you think the HUA made an error in allocating funding for a grant application, appeals can be submitted within 7 days of receiving your final funding decision. See "**Appealing Allocations**" for more information. Before you decide to appeal, please consider point 5) right below.

5. After receiving the final decision on your funding, we encourage you to schedule a brief meeting with one of the Co-Treasurers. We know that most clubs expect much more funding than we can issue, which lies in the nature that we receive limited funding through the SAF fee. We do our best to increase the general budget and therefore funding for all clubs. We will also provide extended office hours within 7 days of receiving your final funding decision. We are happy to be in contact, make adjustments

whenever possible, and talk with you through our decision process. We are trying to serve all the clubs as a resource to the best of our ability and capacity. You can request a meeting with us at this stage.

6. Assuming that all up-to-date and accurate Harvard University Employee Credit Union (HUECU) account information has been provided by the student organization, **funding will be delivered via a HUECU internal transfer within 5 business days of the receipt of the Student Activities Fee Funding Check by the DSO.** This typically occurs by mid October and late February. See "**Disbursement Process**" for more information.

7. Immediately after spending disbursement funds, you are required to submit itemized receipts for transactions as listed in your grant application. **You are required to submit the form with links to the receipt folder and a completed receipt supplement by the last day of reading period.** Any student organizations found in non-compliance with receipt submissions will be suspended from submitting further funding requests until submission of all receipts from prior funding cycles. **Any unused funds must be returned to the HUA Finance Team by the last day of reading period.** To be fair to clubs that submit on time, we will start to sanction clubs harder that miss the deadline without communicating with us. See "**Receipt Compliance**" for more information.

Emergency Grants

As an officially or provisionally recognized student organization by the Dean of Students Office, the application and allocation process for emergency grants is described as below.

For **step-by-step instructions**, please visit the HUA **Grant Application** website page.

1. The Emergency grant application must be submitted using the Finance Team's **Emergency Grant Application Form** with the uploaded **Grant Supplement**. All applications must be submitted within the period listed under the Grant Cycle Timeline section. It is the responsibility of the student organization to ensure that they submit the application sufficiently. **Under no circumstances will submissions outside the Emergency Grant application period be considered for review by the Finance Team.**

2. After your grant application is submitted, the Finance Team will check the student organization's eligibility regarding HUA receipt compliance, audit sanctions, and DSO status. At this stage, we will also check if your case falls or might fall within one of the following points: **emergency, unforeseen expenses, and provisionally approved student organizations.** If none of that applies to you, don't apply since the finance team will reject your application at this point. Next, a Finance Team representative will be assigned to review your grant application case. The DSO-funded

independent grant reviewer will handle the majority of the cases on our behalf and according to the policies in this guide. We are dedicated to having every case briefly checked by a finance team member for accuracy after the independent reviewer has given a recommendation. If you believe there is key information missing in your application, you can schedule an interview with the Co-Treasurers. In most cases, there is absolutely no need to schedule an interview at this stage. The finance team reserves the right to schedule an interview with you.

3. At this stage, your application was reviewed by our independent grant reviewer and briefly revised by one of the members of our finance team. This initial recommendation will be sent out to all Finance Team representatives, who will vote and discuss your final funding recommendation.

4. The final funding decision will be emailed to the respective student organization contact no later than **exactly two weeks following the due date of the application (unless otherwise communicated).** Your reviewed application with changes will be returned for your records. If you think the HUA made an error in allocating funding for a grant application, appeals can be submitted within 7 days of receiving your final funding decision. See "**Appealing Allocations**" for more information. Before you decide to appeal, please consider point 5) right below.

5. After receiving the final decision on your funding, we encourage you to schedule a brief meeting with one of the Co-Treasurers. We know that most clubs expect much more funding than we can provide, which is due to the fact that we receive limited funding through the SAF fee. We do our best to increase the general budget and, therefore, funding for all clubs. We are happy to be in contact, make adjustments whenever possible, and talk with you through our decision process. We are trying to serve all the clubs as a resource to the best of our ability and capacity. You can request a meeting with us at this stage or attend one of our office hours.

1. Assuming that all up-to-date and accurate Harvard University Employee Credit Union (HUECU) account information has been provided by the student organization, **funding will be delivered via an HUECU internal transfer within 5 business days of the final funding decision, assuming the HUA has received the receipt of the Student Activities Fee Funding Check by the DSO.** See "**Disbursement Process**" for more information.

6. Immediately after spending disbursement funds, you are required to submit itemized receipts for transactions as listed in your grant application. **You are required to submit the form with links to the receipt folder and a completed receipt supplement by the listed due date.** Any student organizations found in non-compliance with receipt submissions will be suspended from submitting further funding requests until submission of all receipts from prior funding cycles. **Any unused funds must be returned to the HUA Finance Team by the last day of reading period.** See "**Receipt Compliance**" for more information. Since a substantial number of clubs didn't comply with the receipt submission deadline in the past and to be fair to

clubs that submit on time, we will start to sanction clubs harder that miss the deadline without communicating with us. See "**Receipt Compliance**" for more information on the many changes made.

Grant Timelines

Below are the listed application deadlines, timelines for eligible events, and other important deadlines for grant submissions. **Dates are subject to change.**

If there are any anticipated delays in the delivery of funding, the HUA Finance Team will communicate the information with all student organizations as soon as possible.

We encourage you to add the grant cycles to your calendars with the following link: **HUA Finance Grant Cycle Google Calendar Schedule**. Please use this as an opportunity to stay up-to-date with all important deadlines! The Co-Treasurers will frequently update this calendar**!**

Fall 2025 Grant Cycles		
	Fall 2025 Semesterly	**Emergency**
Application Opens	September 18th, 2025	October 7th, 2025
Application Deadline	September 28th, 2025 at 11.59 pm EST	December 3rd, 2025 at 11:59 pm EST
Revision	September 29th - October 6th	Within a week
Final Funding Disbursement Decision	By October 7th, 2025 at 11:59 pm EST	Within a week
Receive HUECU Disbursement	Week of October 7th, 2025	Within a week
Receipt Submission Deadline	December 9th, 2025 by 11:59 pm EST	Two weeks after the expense unless communicated
Expense Date Ranges	Events & Expenses: Sept. 7th - Dec. 9th Social Events: Sept. 7th - Dec. 3rd	

Spring 2026 Grant Cycles		
	Spring 2026 Semesterly	**Emergency**
Application Opens	January 29th, 2026	February 23th, 2026
Application Deadline	February 8th, 2026 at 11.59 pm EST	April 30th, 2026
Revision	February 9 - February 23	Within a week
Final Funding Disbursement Decision	February 23	Within a week
Receive HUECU Disbursement	Week of October 24th 2026	Within a week
Receipt Submission Deadline	May 6th, 2026 at 11.59 pm EST	Two weeks after the expense unless communicated
Expense Date Ranges	Events & Expenses: Jan. 26th - May 3rd Social Events: Jan. 26th - May 3rd	

Allocation Policies

The following policies are guidelines and **final decisions are at the discretion of the Finance Team[1].** Organizations are able to make a case within the application if they believe that they warrant more funding than our funding caps allocate. Any expenses unable to produce **itemized receipts** are ineligible for funding. **All expenses should only be for Harvard undergraduate students.** It is the responsibility of the student organization to ensure that they are in compliance with Harvard College's rules and regulations regarding hosting events.

General

- **General operational costs:** Operational costs are only funded for items which are **essential to the purpose of the organization** and will be **used in a series of events.** For example, a chess club may receive funding for chess boards to be used by the organization for years to come, but not for Patagonias that advertise the chess club. *A determination for what counts as an operational cost is determined at the discretion of the Finance Team.*

- **Materials and Supplies:** Costs for necessary materials and supplies for events or student groups will be funded at the discretion of the Finance Team. The HUA will look favorably on items that are **absolutely essential and reusable** (ex. a chess board for a newly founded chess club).

- **Tax:** Tax associated with certain products is included in that category's overall total. For instance, tax associated with food purchased will be counted toward the total for the food category.

- **Outside Funding:** The HUA **expects** applicants to secure funding from multiple sources. The HUA generally expects you to spend the majority of your outside funding for a grant cycle. When determining funding allocations, all **outside funding is subtracted from ineligible expenses before eligible expenses.** This benefits you!

- **Retroactive Funding:** The HUA funds retroactive expenses within the constraints of the allocation policies described herein. **When filling out the grant application, attach the receipt in the "Receipt Sheet"** so the Finance Team representative has access to it. Make sure that the retroactive expense request occurred within the appropriate **eligible expense timeframe** for the grant cycle.

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[1] When we speak of the finance team from here on, we also include the DSO-funded independent reviewer to keep these passages simple and clean unless clarified differently.

- **Event Accessibility:** Expenses related to providing accessibility to students with disabilities during events are regarded as "**Event Operational Costs**." The Finance Team will try to accommodate as many accessibility expense requests as possible, but student organizations should make attempts to use other University resources.

Printing

- **Student Publications:** The Finance Team will fund up to **$500.00 for 1 issue** of a publication per semester.

- **Publicity:** Publicity (flyers, postering, online pubbing, etc.) expenses will be funded at most **$30.00 per event**. Student groups **must** acknowledge the HUA visibly on all publicity materials by including the clause "**Funded by the HUA with your Student Activities Fee**" and the **HUA logo** to be eligible for funding. This will now be subject to randomized audits.

    - Electronic publicity, e.g. boosting a Facebook post or buying a Snapchat geofilter, will be funded as long as the publicity contains the words "**Funded by the HUA with your Student Activities Fee**" and appropriate receipts can be provided. This policy applies to upfront and retroactive grants. Proper documentation for publicity is required to receive funds. This includes receipts from Kinkos, Staples, or Gnomon Copy, as well as a breakdown of the print jobs if Papercut is used. A receipt showing money was added to a Papercut account will not be accepted.
    - Clubs that are found to not be including the clause "**Funded by the HUA with your Student Activities Fee**" on material that was printed with HUA funds will be sent an email reminder. Repeated noncompliance will lead to an inability to request HUA funds for printing.

- **Other Printing:** Printing costs will be funded at most **$0.10 per sheet** printed. This policy is intended for the printing of programs for shows and events, and only printed materials that will be given to Harvard college students will be funded. All programs for shows and events must acknowledge the HUA in the sponsors' list. An HUA logo is available on the **HUA website**.

Food

The HUA will continue to fund food for big events and we acknowledge the importance of food for campus and club life. Yet, we want to support more diverse and engaging campus events that have the potential to impact a large amount of students.

Our philosophy is to make HUA funding more sustainable, to allow extracurricular life to thrive. *Therefore, how much food is funded for clubs is determined at the discretion of the Finance Team.*
The HUA will thoroughly review food funding on a **case-by-case basis.** The Finance Team will make any decisions here also based on how essential food is to the mission of the student organization and the strength of their outside funding.

Food Type	**Snacks, Desserts, and Beverages** (Cookies, boba, etc.)	**Small Meals** (Pizza, wings, etc.)	**Full Meals** (Meals that could conceivably replace breakfast, lunch, or dinner)
Up to the first 50 students	$4.00 per student	$7.00 per student	$11.00 per student
After the first 50 students	$2.00 per student	$4.00 per student	$6.00 per student

Additionally:

1. For events with multiple meals, including multi-day events, food costs are capped at **$15.00 per person per day**, for a maximum of 3 days.
2. All dishware (plates, cups, napkins, utensils, etc.) is considered included in the allocations for food. No additional or separate allocations will be made for dishware. **Single-use plastics will not be funded by the HUA.**
3. Alcoholic beverages will **not** be funded.
4. Transportation to pick up or deliver food, such as Uber, is considered to be included in the allocation of this budget.

Performances

- **Property Rights:** A maximum of **60%** of the performance/intellectual property rights will be funded by the HUA.
- **Dry Cleaning:** Subsidized at **50%**.
- **Costumes:** Costumes may receive up to **$1,000.00** in funding per semester only if they will be re-used in several performances. The Finance Team keeps records of which groups receive funding for costumes and for what events; we expect that costumes will be passed down within the membership of the organization for several years.

- **<u>Theater</u>:** Performance organizations are expected to apply for an OFA Project grant. Organizations can receive a maximum of **$1,000.00** for all costs per theater event, including box office fees.

- **<u>Fashion Shows</u>:** Funding for all fashion shows is capped at **$1,000.00** per fashion show which is subject to the same funding policies as other events. The definition of a "fashion show" is at the discretion of the HUA Finance Team.

Transportation

- **<u>Transportation</u>:** Transportation (whether by subway, car, Uber, or other medium) within the **<u>Boston Metropolitan Statistical Area</u>**, as defined by the US Census Bureau, will be funded at most the cost of a roundtrip on the T using a Charlie Card (**$4.80 per student per trip**).
    - Transportation (whether by car, bus, plane, or other medium) **outside the Boston MSA will be funded at most $17.00 per student.** Organizations may only receive this **$17.00 grant twice a semester for the first twenty students**. After the twenty-student threshold, tickets will be funded at a maximum of $7.50 per student. Further trips outside the Boston metro area will be funded at $4.80 per student per trip. Transportation to pick up or deliver food, such as Uber, is considered included in the allocation of this budget.

Event Planning

- **<u>Venue Rental</u>:** All venue costs will be funded at most **$200.00 per event**. These costs include rental fees, set-up fees, custodial/janitorial fees, and usher or required personnel fees, as well as entertainment licenses levied by Harvard or the City of Cambridge or any equivalent adjudicating body.

- **<u>Harvard University Police Department (HUPD) Details</u>:** HUPD details will be funded at the rate provided by HUPD and only if required (anticipated attendance of 100 or more, any function where alcohol is served with anticipated attendance of 100 or more). The HUA will fund a detail at the four-hour minimum.
    - **Weekday HUPD** details will be funded at most **$258.00 per event** ($64.50 per hour).
    - **Weekend evening** (party) details will be funded at most **$400.00 per event** ($80.00 per hour).

- **Disc Jockeys:** DJs/musicians for dance will be funded at most **$200.00 per dance.**

- **Decorations:** Only **thematically linked decorations** will receive funding for an event or project. For example, banners or flowers will not receive funding, but international flags for a cultural event may be eligible.

- **Conferences:** All conferences, symposiums, hackathons, etc. are capped at **$3000.00** subject to the same funding policies as other events. The definition of a "conference" is at the discretion of the HUA Finance Team.

- **Hired Personnel:** All personnel hired for event operations are eligible for funding if they are **provided by an external company with liability insurance.** Individual contractors are not eligible for funding. The student organization has the responsibility of choosing appropriate hired personnel.

Technology/AV

- **Film Screening/Pay-Per-View/Online Video Licenses:** The Finance Team will fund up to **$10.00 for single movie or TV purchases** such as DVDs, Amazon Prime Now rentals, YouTube rentals, or a competing service. Film screening licenses will be funded for up to **$5.00 per attendee, up to $300.00 maximum**.

- **Audio/Visual Equipment:** AV, lighting, and media equipment will be funded subject to the following restrictions:

    - The Finance Team recommends that student groups sign out equipment from ESS, which is based in the Science Center, Room B-02. All of these packages are free if returned on time. The following packages are available:

        - **Computer/Projector:** MTS loans out a computer/video projector for official student groups. This includes a screen, small powered speaker, DVD player, and all necessary cables.
        - **Small Sound System:** Two powered speakers on stands, with one wired microphone and an input for other devices (MP3 player, computer, etc). Good for groups up to 125. Not recommended for parties.
        - **Large Sound System:** Two very large speakers with a powered mixer/amplifier, two wired microphones, and numerous inputs for

other devices. This is the only system MTS has that is recommended for parties.

- Other AV and technology equipment requests will be funded at the discretion of the Finance Team.

Tickets and Entrance Fees

- **Competition and Registration Fees:** Entrance fees to events that are directly related to the purpose of the organization, such as conferences and competitions, will be funded at most **$25.00 per participant per event** up to 25 students. After this, at most **$10.00 per participant** for this event up to **$2,000.00, per semester, total.** Club Sports fees to national competitions will be funded at most $25.00 per person per year.

- **Social Event Entrance Fees:** Social events (e.g. Escape Rooms) will be funded at most **$10.00 per participant** per event up to **$500.00 per event.**

- **Ticketed events: All ticketed events must be SEF eligible** (Student Events Fund). 50% of any additional profits that are made from selling tickets **must** be disclosed as outside/external funding in grant applications. Retroactive grant applications which failed to provide SEF-eligible tickets will not be eligible for funding.

Student Organization Governance

- **General Meetings:** The Finance Team will fund a **maximum of 4 general/normal meetings per semester per organization.** A general meeting is any event that primarily consists of a discussion about items relevant to the organization's operations and goals.

- **Club Elections:** The Finance Team will fund a **maximum of one club election event per year.**

- **Board Retreats:** The Finance Team will fund only **one board-only event per organization per semester.** Funding for these retreats will be **capped at $200.00.** They are funded using the same policies as any other event.

- **Fundraisers:** At the Finance Team's discretion, fundraisers may be awarded grants toward costs of fundraising that are not actual donations to the organization for which funds are being raised. To receive fundraiser support funding, the funds must be directly going to support the students within the organization in a way that can be clearly demonstrated (entrance to a competition, materials for an event, items needed for a show, etc.). Costs associated with the fundraiser must be in line with the allocation policies.

Not Eligible/Special Circumstances

- **Awards and Prizes:** The HUA will **not fund** awards or prizes.
- **Websites:** The HUA will fund domain names and websites on a **case by case basis.** The Finance Team will make this determination based on how essential the website is to the mission of the student organization (i.e., need a website to sell tickets) and strength of their outside funding.
  - These costs can spill over into the summer to be covered by the following semester's retroactive funding (e.g. website domain/provider maintenance costs that occur in Summer 2025 could be covered by the Fall Semester 2025 semesterly funding cycle, in addition to the costs incurred during the Fall Semester of 2025).
- **Lodging:** Costs for hotel rooms, Airbnb, or other overnight accommodations are **not eligible** for HUA funding. This is a liability concern for the HUA.
- **Merchandise:** The HUA will only fund apparel if it is **essential to the purpose of the group or event** (i.e., T-shirts for staff hosting conferences). For Club Sports, **jerseys and uniforms do not fall into this category.**
  - The Finance Team will not, under any circumstances, fund apparel at a rate of more than **$15.00 per apparel item**, and no more than **$500.00 per organization per semester.** This is a strict cut-out that cannot be appealed. Any requests for apparel funding should have a clear, laid-out proposal for why the apparel should be funded and how it contributes to the mission of the student organization.
  - It is the student organization's responsibility to ensure that any merchandise is approved by the **Harvard Trademark Office** before submitting an order through a provider.
- **Guests:** Expenditures for travel of guest speakers and honoraria, lodging fees, and invitation fees for these guests are **not eligible** for Finance Team funding.

Disbursement Process

Funding Cuts

Funding cuts will only be implemented if the total amount of grant money allocated by the Finance Team exceeds pre-determined budgets for the corresponding grant cycle. The funding cuts will only be enough to meet the predetermined budget. In an effort to reduce funding cuts, the Finance Team will roll over any remaining funding from the previous Emergency cycle (or the Semesterly cycle) to the next immediate cycle.

The Finance Team has the **discretion as to how to distribute funding cuts** equitably among student organizations. The Finance Team considers student organization type, size, revenue sources, and previous grant funding when deciding funding cuts.

Retracting Grants

The HUA Finance Team reserves the right to retract grants awarded to student organizations with due cause with the majority vote of the Finance Team. Reasons for retracting grants include but are not limited to, false application information, malicious intent, and fraud.

Payment Method

When receiving grant funding, the Finance Team **requires the funding to be delivered via a HUECU internal transfer.** This policy was created in order to limit the amount of SAF funds going towards wire transfers and check stop-order fees. Additionally, this is a security concern to make sure the grant funds are going to student organization accounts. All ISOs and Club Sports are able to open HUECU accounts according to the DSO. DSSOs and PBHA may request wire transfers. All student organizations with a 501(c)7 status can open an HUECU account.

Exceptions to this policy will be made on a case-by-case basis by emailing the Co-Treasurers at **treasurer@thehua.org** with a signed written statement on why their student organization is forbidden from opening an HUECU account. This will be re-evaluated on a yearly basis.

The Finance Team will **require student organizations to submit their payment method information when applying** to reduce payment processing wait times and fairness to ensure all student organizations are promptly using funds. Also, this prevents some student organizations who would not collect their funds, effectively reducing other student organizations' funding.

HUECU Account Setup

To open an HUECU account, please visit https://huecu.org/student-banking/student-org/ for instructions located at the bottom of the webpage. This process can take a while so we recommend starting this process soon if you are yet to have a HUECU account. The HUA Finance Team will not process any grant applications without account information.

Here is the step-by-step process for opening a HUECU account:

1) Visit https://huecu.org/student-banking/student-org/.
2) Scroll to the bottom of the webpage and click on "Create a New Membership".
3) Follow the listed steps.
4) Complete the SOCO process for HUECU by clicking the HUECU icon on the main page of the **SOCO** website.
5) The SOCH will generally receive your request and then let HUECU know that you can set up a new account.
6) Add officers as Co-Signers by following the instructions listed on SOCO.

Returning Funds

Any **unused funds must be returned to the HUA Finance Team** by the corresponding receipt submission deadlines. The funds may be returned by HUECU internal transfer, Venmo, or PayPal. **Please include the Grant ID in the transaction description.**

- **HUECU Internal Transfer (preferred):**

    1. **Go to the "Transfer & Pay" tab, select "Transfers", then input the account information into the "Make a Transfer" tab.**
    2. **Enter the account number: 9570540.**
    3. **Enter our account name: Undergraduate Council Finance Committee. We are in the process of changing this so if the name does not match, follow up with the Co-Treasurers.**

- Venmo: Please email us at **treasurer@thehua.org** if you would like to use Venmo

- Zelle: Please email us at **treasurer@thehua.org** if you would like to use Zelle

Receipt Compliance

By the corresponding grant cycle's receipt submission deadline, student organizations must show the HUA Finance Team proof of proper utilization of SAF funds by providing receipts. **Failure to provide receipts by the deadline will automatically flag the student organization for audit. Failure to provide receipts entirely will disqualify student organizations from applying for future HUA grant funding.**

As mentioned before, a timely submission is absolutely necessary to ensure compliance with the HUA!

Spending HUA Funds

After receiving your disbursement amount, you should also receive your revised grant application supplement that contains all eligible expenses that the Finance Team determined. In the "Receipt Sheet", you will see a list of all eligible expenses by event by which you are allowed to spend funds by.

If you were disbursed less funds than the grant application supplement's stated total funding request, **you have the discretion of how to divide the funds between events and expenses as long as the expenses are outlined in the event.**

For example, if you were disbursed $200.00 in total to cover two events that had total costs of $150.00 and $250.00, then you may spread the $200.00 between the two events as long as they are under the listed eligible expenses. In this case, you only have to show up to $200.00 worth of receipts. Make sure that you cannot have the funds go over the event funding request total. In this case, you cannot allocate all $200.00 towards the $150.00 event and be receipt-compliant without returning $50.00. Visit the **[24-25] Example Grant Application Supplement (not on Google anymore)** for an example of how to allocate HUA funds by event and expenses.

Receipt Submission

The receipt submission process requires student organizations to submit their personalized Airtable link located in their grant disbursement award email with their completed "Receipt Sheet" in their returned grant application supplement. For more information, please visit the **HUA website** for instructions on filling out the grant application supplement for receipts. **You may request an extension of up to one week to the receipt submission deadline for the grant cycle.** Please contact the Co-Treasurers at **treasurer@thehua.org** to request an extension. Communication is absolutely essential to keep your receipt compliant and ensure efficiency. If you are submitting receipts late for any reason - even if you are after the deadline - let us know immediately.

Acceptable Receipts

Student organizations are solely responsible for accumulating all receipts in order to show proper utilization of HUA funds. The HUA Finance Team has the discretion on whether receipts meet the financial standard of acceptable receipts. If an expense does not provide a receipt, it is your responsibility to create an invoice for it to be receipt-compliant. **Acceptable receipts generally include a date, itemized list of expenses, invoice/receipt number, recipient name, and total cost.** Below is a list of acceptable and unacceptable examples of receipts:

Acceptable Receipts	Unacceptable Receipts
Screenshot/Photo of Paper Receipt	Wire Transfer Statement
Emailed Invoice	Venmo Screenshots
Amazon PDF Invoice	Bank Account Statements
Check Receipt	Shopping Cart Screenshots (Pre-Purchase)
	Google Document with a short statement

Compliance Reconciliation

To reconcile incompliance with the HUA's receipt compliance policy, here are the options open to student organizations:

- **Submit the relevant receipts to the HUA's receipt submission form on time.**
- **Return the allocated funds to the HUA on time.**
- **Go through a financial reconciliation process with the HUA. See details below.**

The HUA Finance Team is sympathetic to student organizations who found themselves liable for the actions of prior boards. However, the Finance Team wants to ensure that responsible financial practices are established to prevent noncompliance with HUA policies. Here are the following steps to reconcile noncompliance with the HUA:

1. **Schedule a meeting with the HUA Co-Treasurers** to discuss the financial situation of your student organization. Additionally, the meeting will include discussions regarding proper finance practices to implement while managing student organization finances. Please contact treasurer@thehua.org to start this process.

2. **Write a letter to the HUA Finance Team** which notes how your student organization fell into noncompliance with the HUA and the necessary steps you are taking to prevent noncompliance in the future. The letter must contain a minimum of 300 words and is to be signed by the President and Treasurer of the student

organization. The Finance Team will then approve or reject the letter for the student organization to become compliant.

3. Once the letter is approved, you are allowed to start applying for HUA grants. The HUA Finance Team will then **mandate your grant receipts to mandatory audits** to ensure that the student organization is following the recommendations made in their letter. To be fair to all funded clubs on campus and to hold up the funding standards, we introduce the following points:

    - Starting with receipt submission for Fall 2025, the finance team reserves the right to cut a club's disbursement for the following semester by 5% per week that receipts are missing without an extension. These cuts will be capped at 20%.
    - Continued receipt noncompliance offenses may result in a permanent suspension from HUA funding. Failing the mandatory audit will result in harsher sanctions.
    - The finance team reserves the right to sanction future funding for a club that didn't communicate after missing the receipt deadline.
    - The finance team reserves the right to sanction clubs that submit receipts late or overly late.
    - The co-treasurers have full discretion on how to handle individual cases that submitted receipts after the deadline and may therefore be listed as non-compliant.

Please be on time or communicate with us!

Receipt Audits

The Harvard Undergraduate Association is not in the business of prohibiting student organizations from pursuing their mission on campus. Receipt audits and sanctions are tools that the Finance Team uses to ensure accountability while providing reconciliation steps throughout the entire funding process. To ensure student organizations are submitting receipts in line with the HUA's receipt policies, the Finance Team is entitled to select student organization's grants for auditing.

Generally, the Finance Team investigates whether student organizations spent HUA grant funds in accordance with our Finance Guidelines and aligns with the event information provided in the grant application. The Finance Team has the discretion on how to distribute sanctions to student organizations that fail their receipt audits. When announcing sanctions, the **Finance Team will communicate why audit sanctions were applied, how to reconcile the audit sanctions, the severity of the sanctions, and how they are applied to future grant application funding decisions.**

As of December 2024, the finance team aims to audit 100% of all clubs that received club funding, while more intensity and priority are given to clubs that:

1) Received a comparatively higher amount of funding during the respective grant funding cycle.
2) Submitted receipts later or after the deadline.
3) Were flagged before for improper handling of receipts or late submission.

The finance team members get assigned a certain number of clubs, for which receipts they will have to review and flag given a common violation (e.g., incorrect receipts, illegal expenditure, missing receipts, other, ...). A flagged club's submission is then reviewed by one of the Co-Treasurers, who may decide to freeze future disbursements to the club unless funds are returned or receipts are submitted. Further sanctions lie within the discretion of the Co-Treasurers.

Application Writing Tips

The HUA Finance Team greatly appreciates it when you are descriptive in your event and expense descriptions. Here are a few notes to know when you are dealing with the grant application process.

Post-Submission Event Changes

The HUA Finance Team understands that the events listed in your grant application supplement are approximations and are prone to changes, especially after the dissolution of the Monthly Grants. **Event information changes like location, time, and dates are acceptable as long as they are still eligible** (ex. new dates must still be in the eligible date range for the grant cycle). When submitting receipts, make sure to change the information so the Finance Team representative does not flag it for not matching the event details. You are welcome to contact the Co-Treasurers to get confirmation on your event change.

Application Submission

As for most things, **please start filling out the grant application early.** This allows you to discuss the events with your student organization board and ask any questions necessary. The Airtable application form may glitch when you submit, so please make every effort to submit the application far in advance of the deadline. **All deadlines are strictly enforced and we will not accept any applications after the deadline.**

Supplement Format Restrictions

The grant application supplement is designed to be interactive and automated. However, this comes at the expense of flexibility in formatting events. **If the grant application supplement does not accommodate your event in the way that it should, please contact the Co-Treasurers** to discuss how to adapt the supplement to your student organization's needs. Often, it might be helpful to reach out to one of the HUA officers and see if cooperation on events may be possible.

Additionally, some allocation policies are capped at a certain number of times used throughout the supplement, like transportation outside of Boston funding. If you wish to prioritize an event to receive the higher eligible expense rate, try to have the event be filled out first before the other events.

Finance Team Resources

The HUA Finance Team will regularly announce opportunities for help during the grant application process which includes office hours, presentations, and email updates. **Join the HUA Finance Mailing List** by visiting **Finance25** and selecting "Join Group" at the top left side of the page after signing into Google.

Appealing Allocations

Please make sure to make use of the new resources we will provide in the week after grant decisions are released first! See Application Process.

If a student organization believes that the HUA has made an error in allocating funding for a grant application, appeals can be made to the Finance Team through the following process.

Please **fully review the Funding Guidelines** before submitting an appeal. We will not hear appeals that directly contradict our guidelines, nor will we alter decisions for funding that were made at the discretion of Finance Team as outlined in the guidelines (i.e. *A determination for what counts as an operational cost is determined at the discretion of the Finance Team*).

Depending on the issues addressed in the appeal, the **Finance Team has the discretion to issue an immediate audit** of the student organization's previous grants. **Appeals must be submitted within 7 days of receiving your final funding decision** for either an emergency or semesterly grant:

1. The grant applicant should contact the Treasurer via **treasurer@thehua.org**, with "**[Organization Name] [Grant ID] Grant Appeal**" as the subject line, with the body explaining the reason for appeal.

2. The Co-Treasurers will bring the appeal to the attention of the full Finance Team. Any member of the Finance Team who has completed the finance training is eligible to weigh in on the discussion.

3. Following a full discussion with the Finance Team, the Co-Treasurers will reach out to the student organization via email within 7 days with a final funding recommendation. **This decision is final and cannot be appealed.**

Contact

If you have questions about the Finance Team, the HUA allocation policies, or the funding process, please contact **treasurer@thehua.org**. If you have a specific question about your grant application, please contact your designated Finance Team representative.
Please make sure to read this guide and our resources before reaching out with a question. Most answers can be found inside here and this guide serves as one of our most powerful tools.

Mailing List

As stated previously, the HUA Finance Team highly encourages student organizations to **join the HUA Finance Mailing List** by visiting **https://groups.google.com/g/finance24** and selecting "Join Group" in the top left side of the page after signing into Google. The HUA Co-Treasurers will regularly send updates by the mailing list.

Resources

HUA Constitution and Bylaws

The HUA Official Constitution and Bylaws outline the language defining the HUA Grant funding process: Official HUA Constitution and Bylaws .

HUA Official Website

The HUA hosts an official website that contains up-to-date information and other resources:

- HUA homepage: https://www.thehua.org/
- External Grant Resources: https://www.thehua.org/funding
- Grant Information: https://www.thehua.org/club-funding/grant-information
- Grant Application (submission link only): Grant Application form
- Receipt Compliance: https://www.thehua.org/club-funding/receipts

Recognized Student Organization Resource Guide

The DSO provides the **Student Organization Resource Guide** to provide the necessary tools to manage student organizations. This document provides information about funding, event registration rules and regulations, and other policies that student organizations must follow.

Receipt Compliance

The HUA Finance Team tracks student organization receipt compliance using the following spreadsheet which is updated occasionally: **HUA Receipt Webpage**.

Harvard SOCO

The Harvard College Student Organization Center Online is the central hub for student organizations that contains the necessary information and forms to manage a student organization: **SOCO**.

Grant Application Materials and Resources

Besides the HUA Finance Guidelines, here are materials and resources that are helpful and instructive while filling out grant funding applications:

- **Semesterly Grant Application Form**
- **Emergency Grant Application Form**
- 25-26_Student Organization Name_Cycle_Grant Application Supplement.x... (DOWNLOAD THIS, do not use the Google Sheets version or it will not work!)

- [24-25] Example Grant Application Supplement (Still relevant)
- [25-26] Grant Application Instructions (Still relevant)
- [25-26] Receipt Submission Instructions (Still relevant)
- Information Session Fall24.mp4 (Still relevant... new info session coming shortly)

Grant Funding Budget

The HUA has an official budget for student organization grant funding. Please see the club funding reports below for details regarding the grant funding allocated budgets.

Club Funding Report

The HUA Finance Team releases summary statistics and other information about student organization grant funding to help inform the Harvard College student body about how the HUA funds student organizations:

- 2022-2023 Club Funding Report: [22-23] HUA Club Funding Report
- 2023-2024 Club Funding Report: [23-24] HUA Club Funding Report
- 2024-2025 Club Funding Report: [24-25] HUA Club Funding Report