



Executive Action Sheet for Senate Legislation

- Senate Bill 331- **042**
- Resolution 331-

I, Sydney Thayer, President of the Student Assembly of William & Mary do hereby:

- Approve
- Veto

The Student Assembly Senate Legislation:

**The Annual Review of OBAC Process Act**

*Sydney Thayer*

President, 331st Student Assembly (23-24)

DATE: **2/28/24**

331<sup>st</sup> Student Assembly  
Senate Bill 331-042

A Bill

*To codify changes to the OBAC and OBAP*

**The Annual Review of the Organization Budget Allocation Committee and Process Act**

An Act of the 331st Student Assembly of William & Mary,

Sponsored by Senator Matt Swenson ('26)

Co-Sponsored by Class President Zoe Wang ('26), Class President Nico Giro-Martin ('27), Senator Matthew Hwang ('25)

Supported by Secretary of Finance Marie Thomas-Sindeh ('24), Undersecretary of Finance Jacob Stein ('26), Undersecretary of Finance Ayanna Williams ('26)

WHEREAS, the Code and Constitution of the Student Assembly are the governing documents of the organization;

WHEREAS, Article I, Section IV of the Constitution of the Student Assembly states "The Senate shall have the power to provide for the budget of the Student Assembly and the disbursement of monies from the treasury of the Student Assembly and of fees allocated for student activities";

WHEREAS, Clause 1, §5.1-1. of the Student Activities Fee Administration and Oversight Act states: "The purpose of the Student Activities Fee is to foster growth, well-being, and excellence in the student experience at William & Mary. The Student Assembly of William & Mary is entrusted with the distribution and allocation of the funds generated by the Student Activities Fee.";

WHEREAS, Clause 3, Section I of §5.1-1. of the Student Activities Fee Administration and Oversight states: "Funding for Recognized Student Organizations, which will be allocated at the discretion of the Organization Budget Allocation Committee ("OBAC")";

WHEREAS, Clause 1 of §5.2-3 of the Code of the Student Assembly states: "OBAC reserves the right to review and present guideline revisions to the Student Assembly Senate each spring semester prior to the next fiscal year allocation process";

WHEREAS, Title 5 of the Code should be reviewed annually to ensure effective, efficient, and equitable financial practices to best serve the student body of William & Mary;

WHEREAS, upon review of the Code, most provisions under Financial Oversight are conducive to effective, efficient, and equitable practices of the OBAC:

WHEREAS, ~~§~~ SR 331-01: The Student Assembly Constitutional Reform Resolution created a committee to revise the entire code, but for expediency purposes, finance code should be revised earlier to prepare for the next fiscal year;

WHEREAS, the only major change from this bill is to the number of senators required for quorum. Senators who serve on the Committee of Finance also serve on the Organization Budget Allocation Committee, and this can be a significant time commitment. For this reason, it is sometimes difficult to achieve quorum. Reducing the quorum requirement will not hinder the judgment of the OBAC, but it will reduce barriers in the process;

Now, therefore, be it

RESOLVED, that the Student Assembly of William & Mary:

1. Amends **§5.1-2. Composition and Responsibilities of the Organization Budget Allocation Committee** in the Code of the Student Assembly to read as:
  - a. The purpose of the Organization Budget Allocation process is to support the activities and initiatives of Recognized Student Organizations which contribute to community development, diversified experiences, and enhanced student life. The process of allocating funding will be done in an accessible, equitable, consistent, and transparent manner.
  - b. The Organization Budget Allocation Process will be facilitated by the OBAC.
  - c. The OBAC will meet on a regular basis to review budget requests from Recognized Student Organizations. The presence of the Secretary of Finance (or their designee as outlined in §5.1-2.4.e), Chair of the Senate Finance Committee (or their designee as outlined in §5.1-2.4.e), ~~Senate Finance Committee Secretary (or their designee as outlined in §5.1-2.4.e)~~; at least 2 Undersecretaries and ~~2~~ 1 Senators, and a staff member from Student Leadership Development (ex-officio) shall be required to establish quorum for the meeting.
  - d. The members of the Organization Budget Allocation Committee will be as follows:
    - i. Six Undersecretaries/Deputy Secretaries of Finance and ~~six~~ seven members of the Senate Finance Committee;
    - ii. The Secretary of Finance shall serve as a non-voting member of the OBAC, and will be responsible for chairing the meetings);
    - iii. ~~The Secretary of the Senate Finance Committee shall serve as a non-voting member of the OBAC, and will be responsible for keeping minutes of all OBAC meetings;~~

- iv. The Chair of the Senate Finance Committee shall serve as a non-voting member of the OBAC, unless they are needed to cast the tie-breaking vote, in the event of a tie;
  - v. Should the Secretary of Finance, or Chair of the Senate Finance Committee, ~~or Senate Finance Committee Secretary~~ be absent, they shall designate a member of the OBAC to act in their stead during a meeting;
  - vi. At each meeting, the Committee shall, by verbal agreement, appoint any one Senator or Undersecretary present to be acting Secretary responsible for taking the minutes of that meeting.
2. Amends **Clause 4 of §5.2-2 Organization Budget Allocation Process** in the Code of the Student Assembly to read as:
- a. OBAC Meeting Procedure
    - i. OBAC meetings may occur without quorum, but without quorum, an official vote cannot be conducted as defined by Clause 3 of §5.1-2.
    - ii. Organizations may request to meet with OBAC.
    - iii. The OBAC shall review requests on a rolling basis. Decisions shall be communicated to organizations ~~on a rolling basis, up to~~ by the last day of the funding quarter prior to the activity.
    - iv. OBAC reserves the right to request additional information from organizations prior to making a decision. ~~Additionally, if time allows, OBAC may choose to defer allocation decisions to later quarters.~~
    - v. Following each quarterly deadline, the OBAC shall submit a summary report of funding requests and allocations to the Senate and post an allocation summary online.
    - vi. The OBAC shall make one of the following determinations for each request:
      - 1. ~~Conference expenses, registration fees and travel expenses, for the purpose of participating in developmental conferences on behalf of their student organization;~~
      - 2. Approve - full or partial request;
      - 3. Defer - this may include a request for additional information or revisions;
      - 4. Partial Deferral - approve some requested expenses and defer decision on remaining requested expenses to a later quarter;
      - 5. Revise and Resubmit within the same quarter;
      - 6. Deny
    - vii. If a member of the OBAC serves on the Executive Board of an organization requesting funding, they shall disclose their affiliation to the Committee, and recuse themselves from deliberation and voting on that organization's budget request.
3. Amends **Clause 2c of §5.2-3 Guidelines for Organization Budget Allocation Process** in the Code of the Student Assembly to read as:

- a. Speakers and Performers; will be required to comply with all university contracting/procurement requirements. William & Mary affiliated individuals (faculty/staff/students) may not be contracted/paid through the OBAC funding process;
4. Amends **Clause 3e** of **§5.2-3 Guidelines for Organization Budget Allocation Process** in the Code of the Student Assembly to read as:
  - a. Payment for DJ services shall be limited to a maximum amount consistent with rates agreed upon between the university and the contracted provider ~~of \$300~~;
5. Amends **Clause 3g** of **§5.2-3 Guidelines for Organization Budget Allocation Process** in the Code of the Student Assembly to read as:
  - a. Conference ~~spending~~ attendance is limited to one conference per semester and one per summer;
6. Amends **Clause 5** of **§5.2-3 Guidelines for Organization Budget Allocation Process** to read as:
  - a. Prior to submitting a budget request within a fiscal year, an organization shall attend an Information session in which guidelines, the submission process, and post-OBAC approval requirements will be explained. It shall be the responsibility of the member attending to share the information from the information session with other members of the organization responsible for submitting the budget; ~~it is preferred that the individual attending the information session be the submitter of the budget request.~~ The individual submitting the budget request must have attended an information session within the fiscal year.
7. Adds **Clause 7** of **§5.2-4 Organization Budget Allocation Distribution and Spending** in the Code of the Student Assembly to read as:
  - a. Prior to submitting a purchase request within a fiscal year, an organization shall attend an Information session in which guidelines, the submission process, and post-OBAC approval requirements will be explained. It shall be the responsibility of the member attending to share the information from the information session with other members of the organization responsible for submitting the purchase request; it is preferred that the individual attending the information session be the submitter of the purchase request.
8. Amends **Clause 1** of **§5.2-6 Reserves** of the Code of the Student Assembly to read as:
  - a. Any monies that are appropriated through the student fee funding, including the Organization Budget Allocation Process, and are not used, shall be returned to the Student Activities Fee Reserve Fund at the end of the fiscal year.
9. Amends **Clause 1e** of **§5.2-7 Contractual Agreements/Other Financial Obligations** of the Code of the Student Assembly to read as:
  - a. Other Funding Agreements with organizations/entities at William & Mary; This shall be limited to organizations/entities for whom a quarterly request process would hinder operations. ~~Examples~~ An example of this is ~~include Steer Clear and Alma Mater Productions.~~

- i. Proposals for new funding agreements or revocation of existing funding agreements shall be determined by the SA Finance Leadership and presented to the Student Assembly Senate for approval no later than the last meeting of the Fall Semester.

10. Amends **Clause 1** of **§5.2-7 Accountability** of the Code of the Student Assembly to read as:

- a. In the event of misuse of funds by students and/or student organizations, they shall be referred to appropriate bodies on campus, such as SA Review Board, Community Values and Restorative Practices Office, Honor Council, and/or Student Conduct Council. Additionally, misuse by student organizations, or student leaders representing organizations, may result in the disqualification for future funding, including already allocated funds. Disqualification for future funding shall be at the discretion of the OBAC and require a  $\frac{2}{3}$  majority vote. OBAC shall also determine the length of disqualification, which may not exceed 3 years.

11. Amends **Clause 6b** of **§5.2-8 Off Campus Accounts** of the Code of the Student Assembly to read as:

- a. The Secretary of Finance shall provide a report of activity in the Off-Campus account at the Senate Finance Committee meeting following the receipt of the ~~monthly~~ bank statements. The committee shall review the on-line records ~~monthly~~ regularly following the meeting at which the Secretary of Finance presents their report to ensure that they are consistent with the executives report.