

## **Hillel at Brandeis**

### **Spending and Budgeting Guidelines**

(Last updated 6/17/2024)

No set of guidelines can be written that addresses every possible expenditure decision which may arise. However, these general guidelines help us in making wise decisions.

#### **1. Meaningful Jewish Experiences**

Before we get into the nitty-gritty details (the “how”), we want to talk about the “why”.

Studies have shown that we build and strengthen identity through meaningful Jewish experiences. According to these studies, six meaningful experiences during college dramatically increases the likelihood that a person makes a long-term commitment to Jewish life.

We take a broad view of what constitutes a meaningful Jewish experience. In order to align with Hillel at Brandeis, students should strive for sophistication, emotional awareness, and quality. From goal setting to logistics to clean up, advanced planning is key to a successful event or offering.

We want to encourage as many meaningful Jewish experiences as possible for as many students as possible to create a strong community during college, and to have an enduring and lasting impact.

#### **2. Student-Led Offerings**

Hillel at Brandeis is proud to support our home-away-from-home to help students build their identities and commitments to Jewish life, learning and Israel.

The overwhelming majority of Hillel’s budget comes from philanthropic monetary donations from people who want Jewish life at Brandeis to be excellent (i.e. it does not come from Brandeis University or Hillel International).

We are obligated legally and ethically to steward charitable contributions toward mission-focused expenditures, including student programs. It is an honor to be partners with our donors in thoughtful philanthropic pursuits.

### **3. Appearance and Reasonableness Tests**

**For every dollar spent, a dollar must be raised.**

Everyone should keep in mind that Hillel at Brandeis is a non-profit organization that has to raise the overwhelming majority of its budget each year (i.e. it does not come from Brandeis University or Hillel International).

Every dollar spent was given by donors and foundations who care about supporting the work we do. They expect that we are stewarding their donations appropriately. Students may at times be apprised of the sources and intent of such funding and asked by the Executive Director to meet with donors or foundations to steward their financial support.

For all potential expenditures, the **appearance test** and the **reasonableness test** should be used.

The **appearance test** is: “How would this purchase look to our donors if it was reported in our newsletter? Would I be willing to sit with them and explain the rationale behind the expense?”

And the **reasonableness test** is: “Is this expenditure necessary for Hillel at Brandeis to carry out its mission of fostering students’ enduring commitment to Jewish life and learning?”

The utilization of these tests should help to guide everyone in their decision-making.

### **4. Things we do not pay for as a registered nonprofit**

Alcohol, swag, transportation when a Branvan is available at no cost, donations to other organizations, anything illegal, and political activities such as lobbying.

### **5. Planning and Design**

It is important to plan and design events thoughtfully. It is best to do this by planning in advance. This also enables us to dream big: If you want to put together a Shabbaton with neighboring schools or invite a noteworthy public figure to campus, we can probably help you do that – but not on short notice.

An event needs to go into the [Hillel Events Platform](#) at least two weeks in advance. An event going into the Platform two weeks out should be ready to go. If you will need help with funding, space reservations, marketing/advertising, etc. then it is critical to ask for professional help at least a month in advance, in addition to setting expectations at the start of each semester.

Good planning and design also means being mindful of the Jewish calendar and the academic calendar (e.g. midterms and breaks), and other major events taking place. Considering what people are excited about at different times is one way to increase

participation and connection and positive experiences. A helpful tool is the [Planning Calendar](#) created by students to help coordinate what events are going on.

\* This is for the purpose of illustration only.

## **6. Guest Speakers, Educators, Artists/Musicians**

The intent of these plan and design best practices and guidelines is for you and your peers to have high quality experiences.

**When inviting guest speakers, educators, artists, etc. to campus, the Assistant Director of Hillel (AD) must be copied on all communications and invitations to come to campus ([spickette@brandeis.edu](mailto:spickette@brandeis.edu)). You should also always CC [hillel@brandeis.edu](mailto:hillel@brandeis.edu).**

Travel and any other overnight accommodations need to be discussed with the AD beforehand. All other planning guidelines (e.g. the Events Platform) also apply. Questions about an event being for students only or open to the public will be discussed on a case-by-case basis with the appropriate Hillel staff advisor and should be discussed well before events are advertised. (Hillel staff are in regular communication with campus, local and national law enforcement and security partners.)

Please note: if a student or a group is bringing a speaker or artist outside of these guidelines, Hillel professionals and student leaders will not be able to help with “emergencies.” For e.g., reserving space, ordering food, printing, marketing and advertising, accommodations, travel, honoraria or any other reimbursements or expenditures related to the event.

## **7. Budgets**

Hillel’s 25 groups, projects, initiatives and committees are awarded a discretionary budget on an annual basis of up to \$30 per unique participant with an annual cap of \$800 total for the group/project/initiative/committee. This \$800 will be distributed in two portions: \$400 at the beginning of the fall semester and \$400 at the beginning of the spring semester.

Note that this budgeted amount cannot be rolled over from spring to fall semesters (i.e. the budget closes at the end of an academic year and funds cannot be rolled over from year to year).

### **Important Policies to keep in mind:**

- 1. Groups are expected to sit down with their staff advisor (or with the AD) and present a programming calendar and proposed budget at the beginning of the semester**

2. In addition, groups will be expected to spend their allotted budget within the first month of a semester (Fall 2024: by 9/27, before the High Holidays begin; Spring 2025: by February 17th) – this will ensure that groups are thinking about planning, budgeting, and implementing impactful programs in advance, and are using the funding thoughtfully appropriately.
3. If there is a reason why purchases need to be made after the first month of the semester has passed (e.g. for an event happening at the end of the semester, etc.), the finance chair of the group needs to sit down with their group's staff advisor and/or the AD during the first two weeks of the semester and discuss their proposed plan/budget for the purchases in question
4. Note that it is acceptable to spend up to 5% of your allotted budget on group leadership bonding; and up to 10% on necessary group supplies. If you have any questions about how to best budget your group's expenses, sit down with your staff advisor or with the AD and they'll be happy to help you work through your concerns.

In some cases, groups and committees that generate a higher level of programming have additional funding approved in their budgeting process. Additional funding beyond that approved budget is tied to a fundraising plan in which Hillel fundraising professionals are involved. Groups, projects, initiatives and committees that receive funding from Hillel are expected not to do independent fundraising.

The cap on unique participants is intentional. There is a tendency for groups and committees to connect with the same people over and over. This is fine. However, it can leave out hundreds of students who might be interested in exploring their identities if only they were included, invited, and welcomed.

*The research shows that statistically Jewish commitment is secured with six meaningful experiences. We really want you to participate for the 50th time with Hillel events! However, from our donors' perspectives, **connecting with new students is also critical.***

*Students who have become "frequenters" have the opportunity to introduce new students to Hillel, increasing their leadership and budget at the same time! It's truly a gift to be able to give someone access to their Jewish community.*

When a group is nearing \$400 in expenditures for the semester they can meet with the AD to propose a plan for future expenditures. Such a decision will be based on:

1. The group's fiscal responsibility to date (e.g. adhering to financial procedures

and budgeting best practices).

2. The group's success in executing a fundraising plan to raise additional funds. Crowdfunding, asking parents and grandparents, selling tickets for large events, etc. are all viable options for expanding a budget without decreasing the amount available for other students. ALL fundraising must be planned in coordination with the Hillel fundraising staff and must adhere to Hillel's fundraising guidelines and best practices.
3. The total number of not-yet-involved students a group or project will include in future events. Hillel is particularly interested in finding and building relationships with students who have not been previously involved or have only come once or twice. A list of such students is available, and successfully reaching out to them and engaging them increases your budget.

Similarly, if you have an idea for a major or high-impact event – something beyond the scope of a regular event that would necessitate an expanded budget – please make an appointment with the appropriate member of the Hillel staff to think through the possibilities.

We offer a limited number of [scholarships](#) to support students interested in attending conferences and other off-campus experiences. If you're not sure who the appropriate person is, please ask the AD.

The Hillel Student Board is allocated a specific budget each semester by the Executive Director. Any individual students or groups or other campus organizations can ask the Hillel Student Board to fund or support an event or project. This budgeted amount cannot be rolled over from spring to fall semesters.

## **6. Ramp: Invoices, Reimbursements, and Credit Cards**

All expenses must be approved in advance as a part of a board budgeting process, or directly by the AD or appropriate Hillel staff member.

Whether you're asking for a reimbursement or an invoice to be paid by check or using a credit card, there must be an accurate participant list, event photos (unless it is Shabbat or *yom tov*), and some other documentation. Without full documentation we can't process a reimbursement or a payment.

Students must:

- Ensure that the participant list on the [Hillel Events Platform](#) is accurate.
- Submit event photos and other information using the [Reimbursement form](#).
- Submit all receipts on Ramp.

- **Reimbursement** requests for out-of-pocket expenses must be submitted with receipts via [Ramp](#) (along with the steps above). When you register, it will guide you through the process of requesting reimbursements. Please make sure to register your bank information - which you'll need to do on the Ramp website - so that the money can be transferred directly, rather than requiring a check. Once everything is submitted correctly, we'll process a reimbursement.
- **Invoices** should be emailed to [hillel@brandeis.edu](mailto:hillel@brandeis.edu), including:
  - Subject: Reimbursement request
  - Name of event:
  - Date of event:
  - Requested amount:
  - Who should the check be made out to? Write it exactly as it should appear on the check.
  - Full address where check should be sent:
  - What budget is this coming from?
  - Attach a copy of invoice/receipts
  - Attach at least three event photos
  - Confirm participant list is in the Hillel Events Platform
  - For ritual items for minyanim (services), purchases and orders are made by staff (unless students have explicit permission). This includes prayerbooks, new kitels, cleaning kitels, Berlin Chapel/shul furniture, etc. Similarly students cannot add new prayerbooks or shul furniture without consulting Hillel.
- **Credit Cards:** In some situations, one student leader of a group may be given authorization to use a digital corporate credit card for specific frequently recurring costs (e.g. kiddushes). The card will have a purchase limit and a semester limit tied to pre-approved budget. Receipts must be submitted following the same procedure/instructions as above. Credit card privileges may be revoked at any time.

## **7. Consumable/paper goods and supplies**

Consumable kitchen items (paper plates/cups/towels, plastic utensils, foil, etc.) are ordered by the Hillel staff. If you are putting on a larger event, or recurring events, please check in with the appropriate member of the Hillel staff about how to proceed.

Supplies frequently used in events such as cookware, arts and crafts supplies, paper goods, cutlery, cups, tablecloths, a karaoke machine, Bluetooth speakers, etc. are often already stocked at Hillel. **Please make sure that you ask a Hillel staff member or check in the closets at Hillel before ordering something.**

Regular inventory is taken but if you use the last of something and do not find more in stock, please let us know right away by emailing [hillel@brandeis.edu](mailto:hillel@brandeis.edu).

Please make an effort to purchase sustainable / recycled / compostable supplies.

### **Acknowledgement of Guidelines**

I \_\_\_\_\_ have received, read and understand the Brandeis Hillel Spending Guidelines. I understand that failure to follow these guidelines may result in my loss of use of my business credit card and/or require repayment to Brandeis Hillel of unauthorized expenditures.

Signature

Date