



WESTERN ILLINOIS UNIVERSITY
ROYAL NEIGHBORS OF AMERICA
FOUNDATION ACCOUNT
POLICY MANUAL

Table of Contents

[Table of Contents](#)

[Glossary](#)

[Important Forms/Links](#)

[The Big Picture](#)

[Introduction:](#)

[The Process:](#)

[Office of Student Engagement, Associate Director](#)

[The Fiscal Agent of Registered Student Organizations](#)

[General Policies:](#)

[Procedural Policies:](#)

[Travel Policies](#)

[Salary Policies:](#)

[Royal Neighbors Chapter Funding Request](#)

[Tax Exemption:](#)

[Automatic Billing](#)

[SAMPLE FORM: Royal Neighbors Chapter Funding Request Form](#)

Glossary

Here are some terms that may be useful for understanding the manual:

Advisor:	A full-time staff or faculty member who advises the student organization.
Fiscal Agent:	A full-time staff or faculty member responsible for the fiscal overview of the student organization.
Treasurer:	A designated full-time student member of the organization.
OSE AD:	The OSE AD (Office of Student Engagement, Associate Director) is the Executive Officer for the Royal Neighbors Foundation Account & reviews all expenditures for all WIU Royal Neighbors funded chapters (approved student organizations).
UPMC:	University Printing & Mailing Center - Where printing, photocopying, and mailing, publication services are done.
Eligible Chapters	Any student organization currently registered & approved as a Royal Neighbors chapter with the Office of Student Engagement & Royal Neighbors America.
Leatherneck Link:	Online platform for students, student organizations, and departments utilized for promotion of events, forms, and roster management.

Important Forms/Links

[Royal Neighbors Chapter Funding Request Form](#)

[Royal Neighbors New Chapter Presentation](#)

[Royal Neighbors Chapter Resources](#)

The Big Picture

Introduction:

About

Collegiate chapters are student-led groups that align with the core mission of Royal Neighbors of America. Their primary purpose is to:

- **Foster Volunteerism:** Engage students in localized, grassroots volunteer work and philanthropic projects within their college campus and surrounding community.
- **Support the Mission:** Promote the values of Faith, Courage, Unselfishness, Endurance, and Humility, and support the organization's focus on women's empowerment and community service.
- **Develop Leaders:** Provide students with opportunities to take on leadership roles, plan projects, and manage an organizational structure.

Benefits and Activities

Members of Royal Neighbors collegiate chapters enjoy several benefits and participate in various activities, often mirroring the resources available to general community chapters:

- **Volunteer Projects:** Chapters organize service projects like stocking food pantries, cleaning neighborhoods, assembling care packages, or hosting fundraisers.
- **Funding Opportunities:**
 - **Chapter Funding:** The national organization provides funding to chapters to help make their projects a reality, with more active chapters being eligible for increased support.
 - **Difference Maker Fund:** Each chapter member can apply for a grant of up to **\$200** once a year to offset the costs of an individual volunteer project.
- **Membership Perks:** Collegiate members are typically offered a complimentary initial General Membership, which provides access to:
 - The **Scholarship Program** (available to beneficial members who are insured by or own an annuity with Royal Neighbors).
 - Member savings and discounts.
 - Opportunities to engage with national programs like the **Nation of Neighbors** women's empowerment initiative.
- **Networking:** Chapters provide a chance to connect with peers.

Starting a Chapter

The process to start a Royal Neighbors collegiate chapter involves several straightforward steps:

1. **Recruit Members:** Gather at least **10 new Royal Neighbors members (not listed on another Royal Neighbors chapter roster)** to join the chapter. Faculty and staff who support your student group can also be members, as well as alumni who continue to volunteer with your group.
2. **Complete Paperwork:** Submit necessary documents, such as a Chapter Roster and a

Petition for Charter. Per Royal Neighbors requirements, the President of the Royal Neighbors chapter must be female.

3. **Receive Start-up Funds:** Once approved, the chapter receives initial funding to begin its work.
4. **Plan and Execute:** Define and carry out the chapter's first volunteer project. Chapters are required to meet at least once per quarter. Chapter meetings count towards volunteer hours on quarterly reports.
5. **Report Activity:** To receive continued funding, the chapter must track and report its volunteer hours quarterly.
6. **Submit** annual Chapter Leader Roster each Fall to Royal Neighbors.

Royal Neighbors New Chapter Presentation can be found [here](#).

The Process:

In order to be eligible to receive Royal Neighbors funding, the following criteria have to be met prior to requesting funding.

- The organization must first be registered and approved through the OSE. Registration to become a Royal Neighbors chapter is coordinated through the Volunteer Programs area of the OSE in collaboration with Royal Neighbors. More information can be found [here](#).
- By submitting a request for funding, the organization agrees to the policies outlined in this manual and will follow them.

Goals:

- Royal Neighbors Foundation funds provide students who are a part of Royal Neighbors chapters at Western Illinois University, a means for sponsoring activities through funds that they may not obtain individually or normally from the University.
- Royal Neighbors' funds aim to provide educational and entertaining programming for students and opportunities for growth and development through leadership and service activities. Funding can be used for costs associated with running a Royal Neighbors chapter and planning additional volunteer activities in the community.

Office of Student Engagement, Associate Director

The Office of Student Engagement, Associate Director, serves as the Executive Officer for Royal Neighbors Foundation funds. They are charged administratively with the responsibility of carrying out the duties by communicating the decision to the requesting organization(s) and by processing the necessary administrative requirements.

In addition to their role, the OSE AD serves to assist student organizations/Royal Neighbors chapters in the management and processing of their allocated funds. The OSE AD is also charged with the responsibility to ensure decisions and policies are followed by funded organizations. In order to accomplish these purposes, the following responsibilities are delineated to the position:

- The OSE AD communicates the Foundation's decisions and information to the

- appropriate administrative offices and registered student organizations.
- Through workshops and educational materials, the OFO instructs organizations on the proper methods and procedures for the procurement and expenditures of Royal Neighbors Foundation funds. The OSE AD also serves to facilitate funding requests that are presented to ensure accuracy.
- The OSE AD serves as a liaison between student organizations/Royal Neighbors chapters and the University Foundation office, Business Office, Budget Office, and Purchasing Office, and assists in the administrative process of requesting checks, depositing income, solving problems, adhering to procedures, and so forth.
- The OSE AD continually strives to upgrade the quality of service provided through policy recommendations aimed at the improvement of procedures and internal management.
- The OSE AD monitors accounts on a periodic basis and informs the Office of Student Engagement Director, student organizations/Royal Neighbors chapters, and administrative offices of any discrepancies.

The Fiscal Agent of Registered Student Organizations

The role of the fiscal agent is to oversee the entire request and budgetary process. The fiscal agent is responsible for ensuring that the organization is fulfilling its responsibilities in utilizing student funds. A fiscal agent must:

- Maintain an understanding of the policies and procedures regarding Royal Neighbors-funded chapters, and adhere to the policies and guidelines as established in the manual.
- Meet with the president and treasurer of the organization to ensure that they understand their roles and responsibilities in dealing with student activity fund accounts and that they understand the policies and guidelines of the Council.
- Provide advice and counsel to the organization in the development of the funding request
- Approve any organization spending and/or any organization request for funding
- Deposit any generated income into the organization's account by the next working business day
- Keep informative financial records for the organization.

General Policies:

1. All Royal Neighbors expenses must follow the policies set forth by the University Foundation. More information can be found [here](#).
2. No organization may commit (by contract or other means) monies that it does not have. Therefore, no organization shall spend money before receiving full approval for its spending.

Note: For the above policy, the first transgression will result in a formal letter being sent to the organization. The president, treasurer, and/or fiscal agent will also be required to attend a meeting in person and present their case for reimbursement. If it happens again, the organization will receive a second formal letter and won't be able to receive funding for the rest of the academic year. This can be appealed to the OSE Director within three days of receiving the letter.

3. Requests should be submitted at least two weeks before the event, and earlier when breaks, holidays, or other scheduling disruptions apply. This is to have plenty of time for the approval process, to advertise for events, and allow time for potential product delays.
4. Organizations should submit one request per event, which includes all expenses.
5. All funded organizations shall have the fiscal agent keep precise financial records. These records may be audited periodically by the OSE AD. It is highly recommended that the fiscal agent meet with the OSE AD to establish how to track funds accurately.
6. Organizations are responsible for keeping updated materials on file with the OSE AD (signature sheets, expenditure requests, DPAs, etc.) during the calendar year.
7. Students may not enter into or agree to any contracts for speakers, speaker's agency, entertainment groups, etc. Only a University Official can enter into a contract. If proper approval was not granted for a speaker, speaker's agency, entertainment group, etc., the organization and its officers will be held personally liable for the contract fees.
8. All purchases require first the approval of the "[Royal Neighbors Chapter Funding Request Form](#)" [Leatherneck Link form](#). Once the form is submitted, the OSE AD will review the form to approve or deny the request. If approved, the OSE AD will submit a request to the WIU Foundation for approval. Once approved, the OSE AD will forward the copy of the approval letter to the fiscal agent for the Royal Neighbors chapter requesting funds.
9. Approval for purchases associated with one event should be requested on one funding request. If a group is found to be purposely stringing an event, the practice of making multiple requests to obtain like items or services, with the willful intent to circumvent the purchasing policy, the request will be sent back.

10. Gifts and awards for academic achievement or student effort are allowable with fiscal agent & OSE AD approval. However, gift cards or gift certificates may not be purchased with Foundation funds unless they are intended for resale as part of a specific fundraising event.
11. Promotional items and prizes must follow [University and Foundation guidelines](#). Any raffle or prize distribution must be documented with the appropriate winner forms (available via the Foundation Resources page) to ensure compliance with IRS and state reporting requirements.
12. The purchase of wearing apparel for students is allowable. The merit of the Royal Neighbors Foundation Fund is that it benefits the student organization and adheres to their mission.
13. Because Foundation funds are charitable assets intended for the support of WIU, making donations or contributions from a Foundation account to other non-profit organizations or external causes is generally restricted. Any such request must clearly demonstrate how the contribution provides a direct, measurable benefit to WIU students and must receive specific approval from the relevant Vice President.
14. When purchasing meals or refreshments, Sodexo (University Catering) should be used whenever possible. All reimbursement requests must include:

An itemized receipt.
The specific business purpose of the event.
A list of all attendees.
15. Royal Neighbors funds cannot be used for alcohol.
16. No approval request should be used as interchangeable or “blanketed” in any way. Requests should be specific enough that expenses can easily be matched directly with the approval request. Requests can be denied or sent back for more detailed information.
17. Any approval request that is canceled is no longer valid. Another request will need to be approved if spending is to occur for that request. If an approval request amount is lowered due to forecasted underspending, the new lower amount is the maximum a group can spend on that request. If spending occurs over the lowered amount, then a new approval request would need to be approved for the overage and the organization could be liable for the difference.

Procedural Policies:

18. Requests must be submitted by the organization’s fiscal agent, President, or Treasurer.
19. If the organization would like to make an appeal regarding the funding that has been awarded to them, they may do so within 3 business days of a decision being emailed to them.

20. **All paperwork** (transfers, RFP's, DPA's, supplemental requests, travel advances, expenditure requests, etc.) **must** be emailed to the OSE AD to be processed **prior** to being sent to the Business or Purchasing Offices.
21. If requesting reimbursement, signed approval letters and itemized receipts must be provided to the OSE AD within 30 days of approved purchase. Receipts that are not itemized may not be eligible for reimbursement.

Travel Policies

22. WIU Royal Neighbors adheres to the [University's Travel Guide](#). Students are encouraged to use university vehicles operated by faculty or graduate students. If students use personal vehicles, fuel reimbursements may be considered for travel more than an hour away from WIU, only for the amount spent.
23. Fiscal agents/advisors may request a travel advancement instead of reimbursement. The fiscal agent is responsible for returning unused funds to the Business Office upon return. You can find the travel advancement request form [here](#).

Salary Policies:

24. Unless designated by Royal Neighbors of America, Royal Neighbors WIU foundation funds are not designed for payment of salaries except in special circumstances. Organizations that desire to employ and pay a member of the WIU faculty or administration for duties or services performed for the organization must seek the approval of OSE AD, the Vice President for Student Success, and the Provost before these individuals can be employed. Services provided by these individuals must be outside of their regularly assigned duties and must require a documented degree of professional expertise.

In order for an organization to be eligible to provide Royal Neighbors foundation funds for direct payment to its members, the organization must first meet the following criteria:

- The service must be of a "skilled" nature that carries a significant level of responsibility.
- The services that the organization provides must be directed towards providing services to the student body.
- Student workers do not apply.

Note:

- ***Exceptions to the above policies and procedures may be made by the Office of Student Engagement based upon the merit of the request.***
- ***Failure to adhere to any of these policies or procedures by an organization will result in a temporary suspension of funds or complete removal of funds.***

Royal Neighbors Chapter Funding Request

- What is it?** A formal request for the use of Royal Neighbors donated funds earned by the chapter through service.
- Why?** Before an organization spends any funds, proper approval must be obtained. Approval must be granted by the OSE AD, Director, and WIU Foundation at all times. Additionally, if the expense is \$1,500 or greater, the Vice President for Student Success would also be required to grant approval. This is also a method of tracking expected spending, allowing organizations the ability to follow their created budget.
- How?** The approval request for anticipated expenditures is found via this Leatherneck Link form (<https://wiu.presence.io/form/royal-neighbors-chapter-funding-request-form>). Questions asked include:
- The name of the organization.
 - The cost center number. Example: 3-1xxxx
 - The amount of money requested.
 - The reason for the request (please include as many details as possible).
 - The expected vendor(s).
- When?** Anytime WIU Royal Neighbors funds are being used an approval request for anticipated expenditures is required.

Tax Exemption:

- All student organizations which are funded by the WIU Foundation through Royal Neighbors of America are exempt from paying state sales tax when doing university-related business. Individuals will **NOT** be reimbursed for state sales taxes when purchasing items for student organizations. Be sure to have the tax-exempt number with you when you are purchasing items that are tax-exempt. Organizations will not be reimbursed if they fail to provide the tax-exempt number. A tax-exempt letter may be provided to CSAF funded organizations by the OFO upon request.
- The University's Tax Exempt Certificate can be found [here](#). You must use your Ecom to view the certificate.
- Student organization purchases that are not funded by WIU Royal Neighbors foundation funds are not tax-exempt under the policies of the University.
- **Student organizations are only tax-exempt when making purchases for the University.** When t-shirts are purchased to be resold, tax should be collected from those purchasing the shirts. Sales should be deposited to subcode 0554, where appropriate amounts of sales tax will be deducted and remitted to the IRS.

Automatic Billing

In order to facilitate and reduce paper flow occurring between departments on campus, several automatic billings have been developed. Automatic billing allows the student organization the convenience of purchasing merchandise or services provided on campus while minimizing the hassle of completing DPA's or RFP's. **An approval request for anticipated expenditures would still need to be completed for the anticipated expenses.** All areas will provide quotes, upon request, which are needed for approval requests. As these expenses are automatic, please be sure to note these charges on the budget request.

Automatic billing procedures occur in the following areas:

- Sodexo
- Document and Publications Service
- Visual Production Service
- Phone/Telecommunications Billing
- Postage
- Academic Computing
- Educational Broadcasting Independent Student
- University Union
- The Western Courier
- WESTEC

SAMPLE FORM: Royal Neighbors Chapter Funding Request Form

This form is exclusively for Royal Neighbors chapters to request funding from the Royal Neighbors Foundation account, based on what is available to the chapter to spend.

Please review the WIU Foundation Resource, [Expenditure Policy](#), before submitting a request.

Chapters cannot spend any money until after all approvals have been completed.

After submission, your form has been sent to the Office of Student Engagement for review. Please allow 7 business days for review from staff. If approved by the OSE, your request will be sent to the Foundation office for approval.

DO NOT SPEND ANY MONEY UNTIL NOTIFIED TO DO SO.

Chapters will not be reimbursed retroactively for expenses.

P-Card Purchases (done by the OSE)

The Office of Student Engagement can pay for items via P-Card, if requested.

Please ensure the event is fully funded *before* the event date. **Example:** If choosing to move forward with the OSE purchasing your approved request, for an event at a bowling alley, all lane fees and shoe rentals must be pre-paid. The cardholder (OSE AD) will **not** attend the event solely to handle on-site transactions or emergency purchases.

1. Pre-Approval & Timing

All purchase requests must be submitted and approved a minimum of **7 business days** before the event date to allow for payment processing time.

We require a **finalized invoice or vendor quote** to process any payment. We cannot approve estimated costs.

2. Cardholder Attendance & On-Site Purchases

The OSE's P-card **will not** be available for use at the event location.

The OSE AD is **not required nor expected** to attend the event for the sole purpose of making purchases.

All required event fees (e.g., venue rentals, entrance tickets, catering deposits, or equipment rentals like bowling shoes/lanes) **must be prepaid** and factored into the initial request.

No exceptions will be made for on-the-spot expenses, emergency purchases, or forgotten items.

3. Required Documentation

Your request must include a line-item budget detailing exactly what the funds will cover.

For all services (venues, vendors, etc.), you must provide a **contract or invoice** showing the final cost and payment due date. NOTE: Your request may not be approved so it is not permitted to have a signed contract BEFORE approval.

For physical items (supplies, prizes), you must provide a **shopping cart screenshot or vendor quote** for exact pricing.

4. Acceptable Purchases

Purchases are limited to items directly related to the success of the student event, as approved in the budget.

The purchase card **cannot** be used for gift cards, personal purchases, or reimbursement of funds already spent by a student/advisor.

Further information about approved expenses can be found [here](#).