



ALMA MATER SOCIETY OF QUEEN'S UNIVERSITY

# VALIDATION PACKAGE

## CONTACT INFORMATION

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## FALL 2024

# INTRODUCTORY REMARKS FROM THE INTERNAL AFFAIRS OFFICE

Thank you for your interest in establishing, increasing, or continuing your fee with the Alma Mater Society! This is a very important aspect of student life, as it helps engage and connect students to clubs, and groups in the Queen's and Kingston community. This process is administered by the Internal Affairs Office of the AMS and should be taken very seriously in recognition of the obligations you incur as a result of receiving student fees. The upcoming referenda serves three purposes:

- (1) Triennial Review – which allows students to vote to continue pre-existing fees that are due for review this year.
- (2) Increasing Existing Fees – in which groups with a pre-existing fee can ask students to approve an increase to their fee
- (3) Establishing new fees

Note all changes to the AMS Fee Slate go into effect for the subsequent academic year (aka, 2025-2026). The following timeline has been approved at the August Summer Assembly:

	Date (2024)
<b>Election Proclamation</b>	September 03
<b>Validation Forms Due (Fee Referenda)</b>	September 20 at 12:00 PM
<b>First Day of the Election Period/Information Session</b>	October 01
<b>Nomination Period</b>	October 07-10
<b>Ratification Assembly</b>	October 21 at 6:00 PM
<b>Campaigning Period</b>	October 23-29
<b>Voting Days</b>	October 30-31
<b>Expense Forms Due</b>	November 01 at 12:00 PM

This information package covers information relevant for the period between Sept. 3 and Sept. 20. A referenda package will be released on October 1<sup>st</sup> to all groups who have passed the validation stage.

Whenever you need to make a submission, please do so at the Election Team's Formstack: <https://queensuniversityams.formstack.com/forms/elections>.

Additionally, you can access relevant policies and procedures at <https://www.myams.org/about/governance/elections/>

As always, if you have any questions or concerns, please contact Renee Balila, Chief Electoral Officer at [ceo@ams.queensu.ca](mailto:ceo@ams.queensu.ca).

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**INTERNAL AFFAIRS OFFICE  
2024-2025**

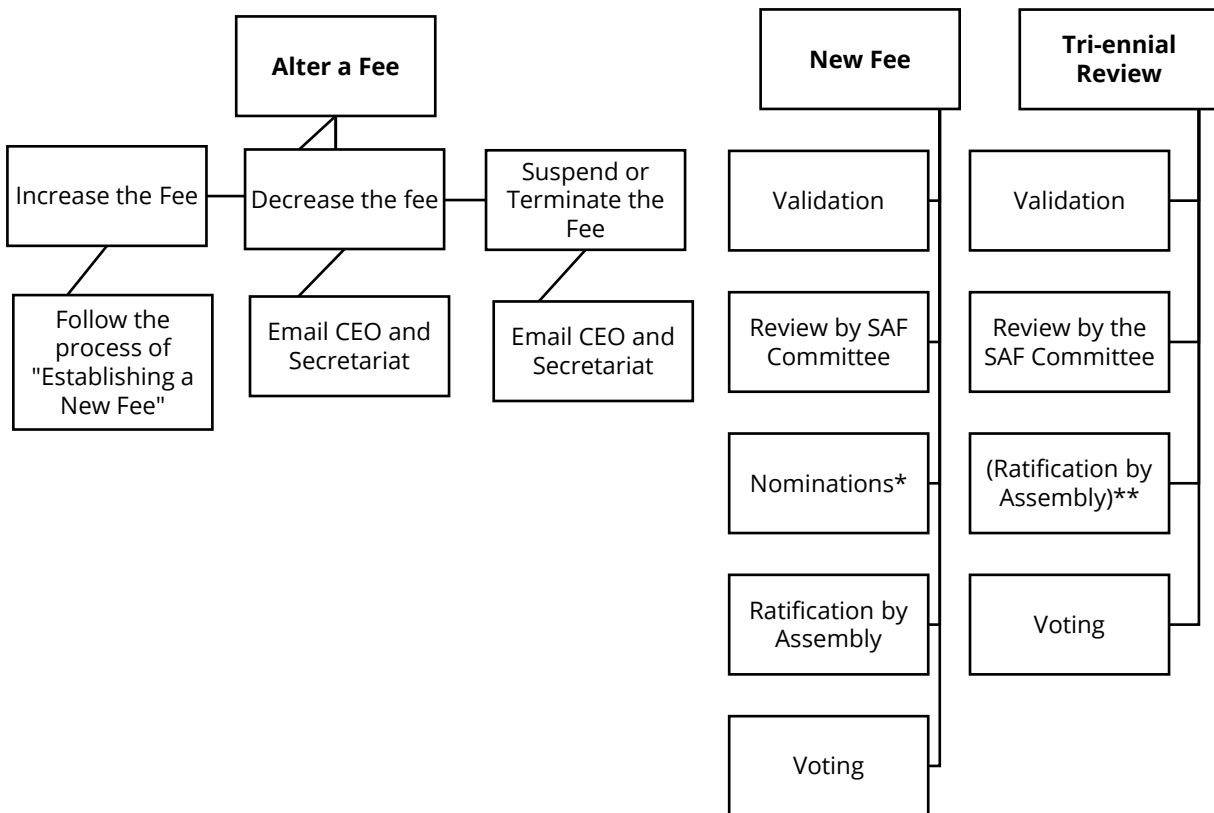


## OVERVIEW

Per the Queen's University Ancillary Fee Protocol, Student Activity Fees (also known as ancillary fees) are fees charged in addition to tuition fees for products and services and are administered by a student association or the University. All groups wishing to establish a fee on the Alma Mater Society fee slate, and/or for one of its member societies must follow policies governing the establishment of Student Activity Fees as established by the AMS Board of Directors. This package gives a brief overview on the process. It is ultimately the responsibility of each group to read, understand and comply with the Student Activity Fee Policy of the AMS Board of Directors.

## SNAPSHOT OF THE PROCESS

The flow chart below provides a brief overview of the process to establish, alter or review a Student Activity Fee. Please note that there are nuances to this process that are not captured in the flow chart. Please contact [ceo@ams.queensu.ca](mailto:ceo@ams.queensu.ca) for further clarification.



\*Certain groups are exempt from the nomination. Successful groups will be provided a referenda package.

\*\*Triennial groups are generally exempt from the ratification requirement, unless the Student Activity Fee Review Committee determines otherwise based on grounds outlined in the Student Activity Fee Policy of the AMS.

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## STUDENT ACTIVITY FEE REVIEW COMMITTEE

The Student Activity Fee Review Committee (“SAF Committee”) reviews all applications for groups seeking to establish, increase, or renew fees. The Committee will determine the eligibility of said groups in accordance with the **Student Activity Fee Policy**. Per sec. 2(a), the SAF Committee retains the authority to deny eligibility to **any** group.

The Committee includes the following:

1. Secretary of Internal Affairs (Chair, non-voting except in the event of a tie)
2. President of the Alma Mater Society (“AMS”)
3. Chairperson of the Board of Directors of the AMS or designate
4. Vice-Chairperson of the Board of Directors of the AMS or designate
5. 3 Voting members of the AMS Assembly (appointed by the Nominating Committee)
6. General Manager of the AMS (non-voting), Commissioner of Clubs (non-voting) and Chief Electoral Officer (non-voting)

## APPLICABLE POLICY

**Student Activity Fee Policy** (“SAF Policy”), approved by the AMS Board of Directors, governs the eligibility requirements, as well as the process for the management and disbursement of student activity fees. The validation process is governed by the SAF Policy; and enforced by the Student Activity Fee Review Committee.

**AMS Elections and Referenda Policy** (“Referenda Policy”), approved by the AMS Assembly, governs the procedures groups must undertake after their application is approved by the Student Activity Fee Review Committee. This includes but is not limited to establishing rules for nominations, the number of signatures needed, and campaigning requirements. This policy is enforced by the AMS Election Team co-chaired by the Chief Electoral Officer and Chief Returning Officer.

## COMPLIANCE

Any group or individual seeking to create or increase, or required to undergo a review, of a student activity fee **must comply** with the Student Activity Fee Policy. Successful groups must also comply with the **AMS Elections and Referenda Policy**. Groups seeking to add a fee that is applied to one of the AMS Member Societies, may be required to comply with additional policies. This authority is derived from the Queen’s University Board of Trustees and directives from the Ministry of Colleges and Universities. You can access the Queen’s University Ancillary Fee Protocol here: <https://www.queensu.ca/secretariat/policies/board-policies/queens-university-ancillary-fee-protocol>

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## KEY TERMINOLOGY AND ROLES

We know that navigating policy and terminology surrounding the referenda can be confusing! The purpose of this section is to give a brief break down of the key terms used by the Internal Affairs Office in discussing Student Activity Fees.

**Chief Electoral Officer** | The Chief Electoral Officer is the main point of contact for all groups relating to Student Activity Fees. The CEO works at the direction of the Secretariat to support the validation stage and oversees the referenda stage.

**Secretariat** | The Secretariat is the Chair of the Student Activity Fee Review Committee and is responsible for ensuring that the Committee meets its mandate, and all applications are reviewed on a timely manner. The Secretariat facilitates appointments to the SAF Review Committee, and monitors compliance as needed.

**Validation** | The Validation Process begins on the day a proclamation is released by the AMS Election Team, and encompasses the deadline to submit the validation forms, as well as subsequent meetings of the Student Activity Fee Review Committee in which the Committee deliberates on whether the applying groups meet eligibility requirements as defined by the SAF Policy. **The validation process is governed by the Student Activity Fee Policy of the AMS Board of Directors.**

**Referenda** | The referenda process begins on the first day of the election period, in which an information session takes place with all groups who submitted a validation form, to discuss the referendum. The referenda process includes but is not limited to the nomination period, ratification by assembly (if needed), campaigning, and voting. **The referenda process is governed by the AMS Elections and Referenda Policy approved by the AMS Assembly.**

**Election Period** | The Election Period refers to the time from the first day of the election period in which the information session takes places, until the day expense reimbursement forms are due to the CEO. The usage of this term refers to a calendar period.

**Nomination Period** | This is a 4-day period in the Election Period, in which groups who are required to receive nomination signatures, can collect them following the guidelines of the Referenda Policy. The Nomination period is purely for organizational purposes.

**Ratification Assembly** | On this day, all groups that have passed the Nomination Stage are required to be present at the AMS Assembly, and Assembly will vote to add questions to the referenda ballot. This is governed by the Referenda Policy.

**Campaigning Period** | This is a 7-day window in the Election Period, in which groups are permitted to speak with students to encourage them to vote “yes” on the ballot.

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## TYPES OF FEES

Under the Student Activity Fee Review Policy, there are **three** types of fees that can be established. All fees, unless recommended and determined otherwise by the SAF Review Committee, are reviewable, and must undergo this process every three-years.

Type of Fee	Is it subject to triennial review?	Determination
<b>Reviewable and Optional Fees</b>	Yes	Any group or individual, assuming they meet the eligibility criteria may apply to establish a fee under this category.
<b>Reviewable and Mandatory Fees</b>	Yes	Per sec. 1(d), mandatory status can only be approved by the SAF Review Committee “to sustain primary facilities/services that are deemed essential to student life”
<b>Non-Reviewable Mandatory Fees</b>	No	SAF Review Committee may make a recommendation to the AMS Board of Directors, who retains the final authority to approve non-reviewable status.

## ELIGIBILITY CRITERIA

There are two categories for eligibility, governed by section 2 of the SAF Policy:

- **Internal** – Groups which are formally ratified, approved, or otherwise administered by the University, the AMS or its Member Societies, or the SGPS.
- **External** – Groups which are not formally affiliated with the University, the AMS or its Member Societies, or the SGPS, irrespective of whether they have an on-campus presence. External Groups must demonstrate they meet the following criteria.
  - The Group is providing a service or opportunity that is available to all AMS and/or SGPS members, and not replicating services provided by existing groups of the University, AMS and its members societies or the SGPS.
  - The Group is inclusive of all AMS and/or SGPS members, and all AMS and/or SGPS members are eligible to be involved in the Group or receive benefit from the Group’s activities.
  - The Group has a presence within the Queen’s Community, which may include events or awareness campaigns run on campus.

There is a separate validation form required for groups falling under either category. For clarification on which category applies to your group, contact [ceo@ams.queensu.ca](mailto:ceo@ams.queensu.ca).

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## VALIDATION STAGE

All groups wishing to establish, increase or continue their fees must submit a validation form by the deadline communicated in the Election Proclamation.

The validation forms includes the following:

- ✓ Contact Information of the Group
- ✓ Verification of Eligibility
- ✓ Questions relating to why the group is seeking a fee, and how it will be used.
- ✓ 300-word Description for Journal, 250-character fee slate description
- ✓ Budget Submission and 500-word Budget Brief

The CEO is available to meet with groups to answer any questions. To set up a meeting, please contact [ceo@ams.queensu.ca](mailto:ceo@ams.queensu.ca), or book a time here: [Internal Affairs Booking Page](#).

Once validation forms are submitted, they are compiled by the CEO, and forwarded to the Student Activity Fee Review Committee, who will meet in the last week of September to deliberate on the submissions, and decide which groups pass the validation stage. The Committee will make every effort to notify groups on their status prior to the beginning of the Election Period. However, the Committee may have additional questions, and groups may be short-listed until the Committee feels that they have all the information needed to make a decision. The Committee will aim to resolve all questions prior to the start of the Nomination Period. **As such, please plan to attend the information session on October 1<sup>st</sup> regardless of your application status and unless you receive directions from the Committee with a determination of ineligibility.**

## 300-WORD JOURNAL DESCRIPTION

**Purpose:** The purpose of the 300-word description is to clearly communicate information about your group, why you seek a fee, how you intend to use it, and why it would be beneficial for students. Think of this as your “short pitch.”

**Triennial Review or Groups Seeking a Fee Increase:** If you are a group required to undergo a triennial review and/or you are seeking to increase your fee, **you must use the same description as the one provided at the time your fee was initially approved.** If you have not saved your description, you can find it by:

1. Go to [www.queensjournal.ca](http://www.queensjournal.ca) and in the search box, type in the name of your group. You may have to scroll until you find an article that has a title along the lines of “referenda statements.”
2. OR if you’re unable to find it, please contact the [ceo@ams.queensu.ca](mailto:ceo@ams.queensu.ca)

**Tip! Be sure to save your 300-word description in a location you can retrieve in the future.**

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## BUDGET SUBMISSION

All groups wishing to establish, continue or alter their student activity fees **must** submit a budget with the provided budget template. Budget submissions in another template will not be accepted, except in exceptional circumstances, at the discretion of the Student Activity Fee Review Committee Chair. For questions, contact [ceo@ams.queensu.ca](mailto:ceo@ams.queensu.ca)

**Purpose:** the purpose of a budget submission is to show a financial projection, using approximations, of how you intend to use the Student Activity Fees collected, as well as communicate your financial results of the past year (where applicable) to allow the committee to understand the impact the addition of a Student Activity Fee may have on your operations.

**Template:** Please use the provided templates to build your own budget. Templates can be found on [myams.org](http://myams.org). Please note that the excel file includes two templates:

- ✓ *Template 1: To be used by clubs and all groups who are seeking a Student Activity Fee to fund their groups' general operations.*
- ✓ *Template 2: To be used by groups who are seeking a Student Activity Fee to fund a **specific** program or set of programs. This template should **only be used** if the fee's expenditure is limited to clearly identifiable program(s) and restricted to Internal Groups with multiple fees. Groups unsure of which template to use, or external groups requesting to use this template may be granted permission in exceptional cases.*

**All three columns (projected, actual and budget) must be completed in the budget template.**

### How to decide which template to use:

To determine which template to use, think about how you intend to use the fees, and how easily you can identify expenses and revenue sources with identifiable program(s). For example, a Queen's University department, seeking a fee to provide/create student jobs on-campus can easily track expenses to the program. However, a club seeking the addition of a fee to expand their operations may have a harder time to separate identifiable initiatives/programs from their general operations.

### Student Activity Fee Review Committee:

Please note that the SAF Committee will determine eligibility only after consulting with your submitted budget, and the submitted budget will be retained and consulted in the event your group is required to undergo an audit in the future. This is to ensure that actual spending of student fees, remains consistent with the declared spending at the time your group's eligibility was validated and approved by the committee. Please note that using *Template 2* will limit spending of the fee to the declared programs. Please keep this in mind if there are any plans to discontinue or alter a program and notify the [secretariat@ams.queensu.ca](mailto:secretariat@ams.queensu.ca) if this occurs after your fee is approved in the referenda.

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**Estimating Student Activity Fee Revenue:** Please use the following as guidance to estimate your revenue from Student Activity Fees:

**Number of Students:** 20,000 Undergraduate Students

*Faculty Societies or groups wishing to establish a fee on the fee slate of a faculty society, to be applied only to members of their society, please use the estimates below for budgeting purposes.*

<b>Arts and Science</b>	12,500	<b>Physical Education and Kinesiology</b>	700
<b>Engineering</b>	3,500	<b>Concurrent Education</b>	900
<b>Nursing</b>	450	<b>Health Sciences</b>	900
<b>Computing</b>	1,200	<b>Commerce</b>	2,000

**Average Opt-in Rate for Optional Fees:** 66% opt-in rate for optional fees.

*Please note that you may choose to use a different opt-in rate (based on historical precedent for your group) for purposes of building your budget. However, you must provide and explain your rationale to do so under the **Note** section of the budget.*

**Details for Revenue.** This depends on your organization type and intended use for the fund. For example, if the fee is being established by a Faculty Society for a specific program, only sources of revenue/expenses related to the program need to be reported. However, if the fee is being used to fund the general operations of a club/group, then the general state of your club/group needs to be outlined. Please refer to the guidance on choosing a template for more information.

**Detail for Expenses.** It is a good idea to break down expenses into general categories that are easily understandable. If the SAF Committee has any questions about your submission, you will be asked to clarify/submit answers to the SAF Committee and have an opportunity to resubmit your budget after feedback. In terms of detail, as a general rule of thumb, if your expense line value is over \$500, *you may be able to break it down into several expense lines* (this is a rule of thumb, not a requirement). For example, as opposed to budgeting \$1500 for marketing, you may be able to break it down as \$500 for website, \$300 for printing costs, \$200 for social media advertising, etc, ... However, if you're budgeting for \$2,500 for rent, you likely cannot break it down further. A reader should feel comfortable that the value of an expense is reasonable with the description of the line. Use your own judgement in balancing how much detail you provide based on the expense line. If you have any questions, contact [ceo@ams.queensu.ca](mailto:ceo@ams.queensu.ca). Be mindful that this is not an audit, and you are not expected to provide exact dollar values for expenses, however, estimates for the projected expenses should be clear and reasonable.

**Budget Release:** At 12:00 PM on the first day of campaigning, all budget submissions for successful groups will be released in tandem with the submitted 300-Queen's Journal Statement on the AMS Website to allow students to understand how fees are intended to be used and promote greater transparency and accountability.

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## FURTHER GUIDANCE FOR THE BUDGET

### Revenue Sources

- ☞ **Fundraising:** Involves generating money through activities like charity events, crowdfunding, or donation drives. Fundraising should be broken down by campaign, event and initiative on the budget.
- ☞ **Student Activity Fees:** Collected from students. Please use past actual values (if available for the previous year); and guidance from the “estimating fees” section on page 10 for projected funding value.
- ☞ **Membership Fees:** Regular payments made by individuals or organizations to gain access to benefits or services. Please include cost/person in the notes.
- ☞ **Grants and Bursaries:** Financial awards given by government bodies, foundations, or institutions to support specific projects or individuals. Please include the name of the grant/bursary as well as the name of the issuing organization in the Notes.
- ☞ **Ticket/Event Revenue:** Income earned from selling tickets or admission to events.
- ☞ **Other:** Includes miscellaneous sources of income not categorized above, such as sponsorships, merchandise sales, or service fees. Feel free to rename this header to a category not covered above.

### Expenses

- ☞ **Bank Fees:** Charges imposed by financial institutions for account maintenance, transactions, and other banking services.
- ☞ **Personnel Expenses:** Costs related to employee compensation, including salaries, wages, benefits, and payroll taxes. These expenses cover all financial aspects of staffing, including regular payments and additional employee-related costs. If funds are being used to create student opportunities, please include them on a separate line, and add a note to describe the time commitment/number of students. Please note that certain internal groups ex. AMS clubs, have restrictions under the AMS Clubs Policy which precludes them from spending for personnel wages. The SAF Committee reserves the right to consult with and notify the administrative body your group belongs to prior to the validation. If the group is found to be in violation of any AMS or other Society Policies, at the time of validation or retroactively, the Committee may vote to suspend or terminate the Student Activity Fee.
- ☞ **Office Supplies:** Expenditures for items necessary for daily office operations, such as paper, pens, printers, and other stationery.
- ☞ **Promotional Material:** Costs for creating and distributing marketing assets like brochures, flyers, and branded merchandise.
- ☞ **Event Expenses:** Expenses associated with any events or fundraising activities, as well as other events that fall within the mandate of your group (not team socials).
- ☞ **Orientation Week:** Costs for organizing and conducting orientation activities for incoming first years in September.
- ☞ **Socials:** Costs related to organizing social events or gatherings.

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- ☞ **Operational and Occupancy:** Expenses for running day-to-day operations and maintaining physical space. This includes rent, utilities, maintenance, and other costs associated with keeping facilities functional and operational.
- ☞ **Miscellaneous:** Various small or infrequent expenses that don't fit into other specific categories. This category captures unexpected costs or items not easily classified under regular budget headings.
- ☞ **Other Expenses:** Includes any additional costs not covered by the above categories. This can encompass unique or irregular expenditures that impact the overall financial planning and require flexible budgeting.

## POSSIBLE OUTCOMES

**NEW FEES** | If you are successful in the validation process, but your question fails in the referendum, **you may not reapply in the subsequent validation and referenda period.** For example, if you undergo the process in Fall 2024, and your question fails, you may not participate in the Winter 2025 validation and referenda.

**ALTERING FEES** | Alternations to existing fees are governed by Section 5 of the SAF Policy Committee. A group receiving a Student Activity Fee shall have the authority to decrease its fee or alter its mandatory fee to be subject to individual opt-out without requiring student's approval. For a decrease to take effect, the group's president or officially designated representative shall email the CEO and Secretariat. If you are applying to increase your fee ahead of the triennial review schedule, please be aware of the following:

- ☞ **Successful Fee Increases:** In the event a reviewable optional or mandatory fee successfully seeks an increase prior to its triennial review, it shall not be subject to review for an additional three years, and year one is the year in which the increased fee was first collected.
- ☞ **Defeated Fee Increases:** A group which seeks an increase to their Fee, and is defeated during the referendum period, does not lose the original Fee. The group retains their original Triennial Review schedule and can continue collecting the Fee.

**TRIENNIAL REVIEW** | If you have been required to undergo the triennial review process:

- ☞ **Increasing Fee & Tri-Review:** A reviewable fee may seek an increase within the same academic year as its triennial review as long as it occurs during the first referendum period (aka, fall term). Should the question to raise the Student Activity Fee fail, it may return for triennial review in the winter referendum period.
- ☞ **Discontinuation of Fee:** Should a fee be discontinued as a result of its triennial review; it may not return to referendum in the subsequent referendum period.

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