BIG SKY SAOF DISTRIBUTION POLICY

1) Contact

- All requests must be sent via email to Natanee Spencer at nspencer@bigskyconference.org.
- All questions regarding permissibility of use of the fund should continue to be directed to Jaynee Nadolski (jnadolski@bigskyconference.org).

2) Frequency

- The Big Sky will process requests **once** a month.
- Requests must be submitted by the 15th of each month.
- Requests submitted after the 15th will be processed the following month.
- Exceptions may be requested due to mitigating circumstances.
- Funds may be requested September 15-June 6.

3) Allowable Recipients of Issued Checks

- Institution
- Vendor – *request must include vendor address*
- The Big Sky will not issue checks directly to a student-athlete or to both the institution and the student-athlete. Checks that are not being sent to a specific vendor will be made out to the institution and an accompanying memo will indicate all of the student-athletes and their approved amount that is included in the check total.

4) Taxes

- The Big Sky will not remove taxes for foreign student-athletes and will issue the institution the amount requested.
- **It is the institution's responsibility to remove the appropriate tax per student-athlete and issue the correct amount to the student-athlete.**

5) Requests

- When submitting for an individual SA for a variety of reasons, institutions must enter the student-athlete's name multiple times and indicate the amount requested per category.
- If a dollar figure can be attributed to a specific student-athlete, the request must include the name of the individual student-athlete, rather than the institution.
- If the request is specific to the institution, please indicate by typing institution's name.
- Institutions are responsible for tracking SAOF amount through the year and notifying the Big Sky monthly if the distribution check is incorrect.
- **The Big Sky SAOF Request Form is the only form that will be accepted.**
- **Handwritten requests will not be accepted.**

6) Academic Enhancement Fund

- The Big Sky does not accept requests from the Academic Enhancement Fund. The NCAA issues those funds directly to the institution.

7) NCAA Reporting

- Each institution is responsible for tracking and submitting information on SAOF use through the NCAA portal in July. The Big Sky will review the information submitted to confirm correctness and submit it to the NCAA.

Student-Athlete Opportunity Fund FAQ

1) **How do I know if my request will be approved?**
   All questions about the permissibility of a request should be directed to Jaynee Nadolski (jnadolski@bigskyconference.org).

2) **How do the funds work together?**
   In 2008-09, institutions received greater flexibility in utilizing the fund. All of the monies may be used utilizing either SAOF or SAF guidelines. Essentially, both SAOF and SAF may be used as SAOF if an institution so chooses. Because SAF does not roll over at the end of the year, the Conference Office will process all applications using the SAF first. Once an institution has spent its SAF allotment, SAOF will be used.

3) **How can I find out how much money I have during the year?**
   At the beginning of the year, the conference office notifies each institution the amount of money it has been allocated for the fund for the year, and the total it will have for the upcoming year with any funds that have rolled over. Each month, the Big Sky sends out a *QuickReport* to each school that outlines year-to-date requested funds and the total amount spent. Questions regarding how much money your institution has left in the fund for the year may be directed to Jaynee Nadolski.

4) **What is my responsibility for SAOF/SAF reporting to the NCAA?**
   Institutions are responsible for the year-end reporting of SAOF to the NCAA. Once an institution has finished inputting its information, it will submit the report, which will then be sent to the Big Sky for review. The Big Sky will verify the accuracy of the report and then submit the final report to the NCAA. If there are discrepancies found, the institution will be contacted. Prior to June 1, the Big Sky will send out a directive to each institution with a due date for reports to be submitted for review.

5) **What are the restrictions on use of the SAOF/SAF?**
   The funds may not be used for the following:
   a. Countable GIA
   b. Salaries
   c. Capital Improvements
   d. Athletic Opportunities
   e. Team Travel

   In addition, the governing provision of the SAOF/SAF is that they must provide direct benefits to student-athletes and should not be used for items/services that the institution is expected to provide to student-athletes, such as equipment, per diem, standard medical supplies, etc.

6) **How do I access the Academic Enhancement Fund and what can I use it for?**
   The Academic Enhancement Fund money is sent directly to your institution in the Fall, and is under the purview of the President. Application for and usage of falls under institutional policy.

Student-Athletes Eligible To Apply for Funds

The following indicates what student-athletes may apply for and the different types of expenditures they may receive from the NCAA's special assistance fund:

1. Pell-eligible student-athletes *(except non-qualifiers in their initial year of residence),* including student-athletes who have exhausted their athletics eligibility or no longer are able to participate because of medical reasons.

2. Student-athletes who are receiving countable athletically-related financial aid and who have demonstrated financial need as determined by an analysis conducted consistent with federal methodology or the methodology used for all students at the institution.

3. For a foreign student-athlete, an official foreign student-athlete advisory entity of the institution outside the athletics department must certify in writing that the student-athlete has financial need.

4. Non-scholarship student-athletes with no Pell Grant and initial financial need may not apply for the cost of clothing or other essential expenses, but they may apply for expenses included in the other three categories: expendable course supplies and rental of required non-expendable course supplies; medical and dental costs; and costs associated with student-athlete or family emergencies. *(NCAA News, 10/11/99 Guest Editorial by Joseph M. Camille)*

Big Sky Philosophy for Use of Fund

The guiding principles of the fund are to meet the student-athletes' needs of an emergency or essential nature for which financial assistance otherwise is not authorized for an institution to pay due to NCAA bylaws or Big Sky Code regulations. Conference interpretations not addressed by the Division I Management Council will remain within the "intended purpose set forth by the NCAA. In approving use of monies from the special assistance fund, the Big Sky Conference follows these general standards:

1. The special assistance fund is to be used for expenses that are not provided for in the NCAA bylaws or waiver process *(e.g., allowable by incidental expense waiver),* Big Sky Code regulations, or expenses that are not covered by other insurance policies. The fund may not be used as a source for awarding financial aid that is otherwise permissible under NCAA bylaws.

2. The money may not be used to cover expenses for which the university could have awarded financial aid *(e.g., book scholarship for required textbooks*).

3. The money must be used for the student-athlete's needs and expenses, not those of the spouse, children or other family members.

4. Expendable course supplies include those items in which the student-athlete will use up the value of the item during the course of the semester or year (*e.g., paper, pens, notebooks, printer supplies, staples*).

5. The fund may not be used to pay for medical or dental costs that are a consequence of an injury or consequence resulting from participation in varsity athletics and is an approved institutional expenditure.

Permissible Uses of the Fund and Examples

1. Cost of clothing and other essential expenses *(not entertainment)* up to $500 for Pell-eligible student-athletes and full and partial grant-in-aid student-athletes who demonstrate financial need.
   a. Must be clothes and essential expenses for the student-athlete; clothing and other expenses cannot be extended to family members.

2. Cost of expendable academic course supplies and rental of non-expendable supplies that are required for all students enrolled in the course.
   a. Expendable Course Supplies
      (1) Notebooks and ring binders
      (2) Pens and highlighters
      (3) Art supplies
      (4) Tickets to theater performances that are a requirement for a theater class.
      (5) Film and darkroom supplies required for photography class
      (6) Diskettes
      (7) Backpack
      (8) Desk supplies *(stapler, hole punch)*
      (9) Filler paper
      (10) Reference book for lasses
      (11) Index cards

   b. Rental of Non-expendable Supplies
      (1) Computer equipment
      (2) Cameras
      (3) Calculator required for class

3. Medical and dental costs not covered by another insurance program *(e.g., premiums for optional medical insurance, hearing aids, vision therapy and off campus psychological counseling)* and not related to an injury, or a consequence of athletics participation and is an approved institutional expenditure.
   a. Contact lens or eyeglasses *(but not both).*
   b. Non-cosmetic dental expenses.
   c. Medical expenses must be that of the student-athlete; payment cannot be extended to family members.
   d. Payment for drug and alcohol counseling.
   e. Massage therapy
   f. airplane ticket to travel home for surgical procedure on SA to be performed
   g. Rental expenses for an orthopedic support mattress for a student-athlete
   h. Medical insurance is required by university for all students *(most commonly for foreign students)* that is not part of the regular fees of the University.

4. Diagnostic testing for Learning Disabilities

5. Costs associated with student-athlete or family emergencies.
   a. Flying a body home.
   b. Flying home to get citizenship.
   c. Round-trip airplane ticket home to visit a sick or injured parent.
   d. Round-trip travel home for a funeral of a family member
   e. Travel expenses for parent to be present for student-athlete's surgery.
      (1) When the injury occurs during practice or competition, the NCAA has approved incidental expense waivers to pay for the travel.

Prohibited Uses of the Fund and Examples

1. Financing any portion of an institutional grant-in-aid that could have been awarded to the student-athlete.
    a. Required textbooks, course packets, and lab manuals *(expenses can be awarded through a book scholarship).*
    b. Food *(meals can be awarded through a board scholarship).*
    c. Lab fees for classes *(can be awarded with fees scholarship).*

2. Non-qualifiers may not receive special assistance funds during their first academic year in residence.

3. Entertainment expenses for student-athletes.

4. The purchase of disability, illness or injury insurance to protect against the loss of potential future professional sports earnings.

5. The funds may not be used for administrative purposes.

6. Costs covered by another insurance program or expenses that are permissible under NCAA legislation or the Big Sky Code.
    a. Costs associated with injuries suffered as a result of athletics participation.

7. Examples of Other Expenses Not Permitted:
    a. Payment for car repairs to enable a student-athlete's spouse to drive to job interviews
    b. Payment for required course-related books, inasmuch as this is permitted under existing legislation
    c. Baby-sitting expenses
    d. Expenses for family members
    e. Calls home because student-athlete is homesick
    f. Jewelry
    g. Cosmetics *(except for medical purposes)*
    h. Academic planners
    i. Graduate/Professional school entrance exam prep. courses (e.g., LSAT, GMAT)
    j. Purchase of calculator required for class (*can only be rented to student-athlete, not purchased for them to keep after the class is completed*)