Allocations 101

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Student Activities Fees

• Collected from every student
• Constitutes student activities fund
• Funds PPC, WPTS, PittServes, SORC, SGB operating expenses, etc.
• Distributable fund ~ $800-900k
• Fiscal year- July 1-June 30
Allocations Liaisons

• Five office hours/ week
• Able to:
  – Answer questions
  – Help fill out requests
  – Prep you for meeting
Funding Eligibility

1. SORC Certification
2. 75% non-CGS composition
3. Not recognized social fraternity/sorority
4. No outside bank account
Funding Philosophy

- Aim to aid student groups in operating on campus by helping to offset costs
- Shared responsibility
- Varies by group category
- “An aid, not a crutch”
Expectations of Student Orgs

- Knowledge of the process
- Reach out to liaisons when needed
- Timeliness- not considered a compelling reason to act on the request
Supplementals (non-SAAGs)

**Submission**
- Submit online form by 5pm Wednesday
- Receive confirmation email

**Allocations Hearing**
- Receive email on Thursday with time to appear
- Meet with Committee during Thursday night meeting
- Receive decision email by Friday at 2pm
- Money in SORC account on Friday
- Reheard following week if postponed

**Public Meeting**
- If over $1200
- Appear in front of Board at 8:45pm on Tuesday
- Money in SORC account on Wednesday
Budgets

• For groups who have the ability to plan long-term

• This means:
  – Know expenses in advance
  – Have documentation of exact costs

• Submitted online once per semester by pre-announced dates (March 27)
Complete Requests

• Cannot ask for more later
• Groups are encouraged to collaborate on requests
  – Cannot submit separate requests though
Funding Release

• Opportunity to return unspent funds
• Funds subtracted from caps
• Filled out in the office with a liaison
Rollback

• Unspent/ uncommitted funds are returned
• End of December, over summer
Budget Modifications

• SAAGs only
• Follows supplemental process
• Allows for redesignation of funds
Summer Operations

• Don’t officially operate
• Email votes may occur at discretion of Chair if group can demonstrate that the expense was unforeseen during normal periods of operation
Arbitration

• Groups that feel that a decision was not made in accordance with policy may file for arbitration
• Final decision rendered by SGB advisor
Non-fundable Items

1. Programs competing with PPC
2. Donations or personal gifts
3. Scheduled substances
4. Expenses related to candidates for public office
5. Salaries, stipends, honoraria, or any remunerations to advisors, coaches, officers, or members
6. Travel expenses for non-students
7. First class airfare
8. Requests requiring travel outside of the continental US
9. Spring break travel (unless required)
10. Services which SORC offers
11. Off-campus leadership retreats (SAAG exception)
12. Alternative spring break programming
13. Individual membership dues
14. Expenses related to academic requirements
15. Social or recruiting events
• Deficit spending
  – Actual expenditure or contractual commitment to expend
• Requests denied previously in same FY
• On-campus conferences/competitions
• Expenses judged to be the responsibility of a department/school/unit sponsoring a club
• Expenses judged to be responsibility of individual members
• Programs that are primarily a fundraiser
Request Types

- Program Expense Itemization
- Purchase, Rental, Service
- Competition Expense Itemization
- General Travel
- Conference Request
General Guidelines

• Lodging ratio - 4 people:1 room

• Travel
  – University mileage rate
  – IRS Reimbursement Rate (moving): $.235/ mile
  – Corporate rate for outside presenters: $.555/ mile
Special Info Regarding Conferences

• Like to see a plan to pass on information on return
• $2000 per FY
• Max 4 delegates’ expenses per conference
• Cannot fund for meals
Special Info Regarding Competitions

- $5,000 per FY
- Committee typically looks for a greater degree of shared responsibility
- Encouraged to fundraise/collect dues
Special Info Regarding Programming

• Purchases typically scrutinized for reusability
• Food policy
  – Never for meetings or recruitment
  – Food must contribute educational value
  – $2.50/ person
Special Info Regarding Purchases

• Reusability
• Storage space
• Staying within organization
SAAGs

- Conferences
  - $5000 cap
  - Number of delegates based on documented need

- Food
  - Fundable based on the nature of programming and events involving significant portions of the student body
  - $2.50/ Pitt student

- E-Board Retreats
  - Fundable
  - Must have documented proof of advisor’s attendance
  - Costs incurred during retreat or by advisor are their responsibility

- Governance Group Conferences
  - $2.50/ Pitt student for food
  - Must submit agenda
Admission Fees

• “An admissions fee is any charge for any portion of an SGB-funded program, even if the charge occurs before, during or after the program.”

• No group may charge Pitt students for anything for which SGB provided funding

• Suggested donations at the door are considered admission fees

• May not charge Pitt students for any item funded in full or in part by SGB

• May ask for donations, but not at the door
Allocations Committee Funding Request

If you have any questions, please reach out to your liaison: http://sgb.pitt.edu/allocations/ or stop by the SGB or Allocations Office in Room 848 WPU. Click here if you are unsure of which request type to choose. This form is not for Budget Modifications. Please go back to the SGB website and use the other form.

Student Organization *

Event Title / Description *
Fifth Annual Festival / National Tournament

Requestor Name *

Requestor Email *
abc123@pitt.edu

Requestor Phone Number *

Request Submission Date 01 - 13 - 2015

Request Type
Program Expense Itemization
# Add Line Items

Please include the total amount of money for each line item. **Do not** fill out the columns that say "Allocations Approved" or "Board Approved." They are grayed out. Those will be filled out by the Allocations Committee. If you need help categorizing an expense under a line item, [click here](#).

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Amount Requested</th>
<th>Allocations Approved</th>
<th>Board Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. Of People</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Honorarium</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airfare</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ground Transportation</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lodging</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchases</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rentals</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
</tr>
</tbody>
</table>
Now provide a brief description of everything that is included in the corresponding line item. Showing the math behind how you came up with the amount can be helpful as well. For example, the lodging description could look like: *4 rooms for 3 nights at $100 per night = $1200.*

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honorarium Description</td>
<td></td>
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<tr>
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<td>Purchases Description</td>
<td></td>
</tr>
<tr>
<td>Rentals Description</td>
<td></td>
</tr>
<tr>
<td>Services Description</td>
<td></td>
</tr>
</tbody>
</table>
Additional Information

Please provide answers to the following questions:

Location

Start Date
Month - Day - Year
End Date
Month - Day - Year

Start and End Time
4:00 pm - 8:00 pm

Justification

A justification outlines the purpose, value and need of your request. For each type of request, there is specific information that we are looking for. If you would like to write more than 1,000 characters, feel free to do so but upload a separate document labeled "Justification" under the "Documentation" tab.

Program Justification: (1) Provide an overview of the program. Explain the need, value impact and history of the program. If this program has been put on in the past, explain its successes. (2) Please state if you are charging a fee for Non-pitt students and Pitt Faculty and if so, explain how much.

Justification
Documentation

For every single number on this request, you need some type of documentation to back up that number. This can be screenshots of emails and webpages, pictures that you’ve taken or pasted items in a word document. It is recommended that you put everything in a single word document and upload that.

**Documentation 1**
Choose File
No file chosen

**Documentation 2**
Choose File
No file chosen

**Documentation 3**
Choose File
No file chosen

Administrative Section

You do not need to fill out this section. Leave these blank.

**Request Number**
[Blank]

**Date Logged In**
[Calendar]

**Logged In By**
[Blank]

**SGB President Signature**
[Signature]

**Allocations Chair Signature**
[Signature]

Submit
Documentation

• Every penny requested must be documented
• In the case of requested amounts exceeding documentation, requests are revised to documentation
• This means no documentation = no funding
• Must be from the source
Thanks for Coming!

- We are here to help!
- View Manual online
- Reach out to your liaisons
  - Contact info and office hours online
  - Ask questions!
  - Have them review requests
Club Sports
**Opt-in to allowing SGB to view SORC deposits**

- Eligible to receive up to $15,000
- For entire fiscal year
- Includes nationals

**Opt-out to allowing SGB to view SORC deposits**

- Eligible to receive up to $3000
- For entire fiscal year
- Includes nationals
Club Sports- Effective FY ‘16
Club Sports - Effective FY ‘16

• Cap eligibility determined by SORC contributions from previous FY
• Greater club autonomy
• Groups may opt in or out
Has the organization existed for less than one year, and therefore does not have a year’s worth of SORC deposits?

- YES
  - $3000

- NO
  - Has the organization opted-in to allowing SGB to view its SORC deposits?
    - YES
      - The organization has contributed...
        - Up to 15,000
          - Eligible to receive up to ½ of contributions, with a maximum cap determined by Part (B).
        - Above $15,000
          - Eligible to receive up to ½ of contributions up to $15,000 + up to 1/3 of contributions in excess of $15,000, with a maximum cap determined by Part (B).
    - NO
      - $2000
<table>
<thead>
<tr>
<th>Roster Size</th>
<th>Maximum Cap Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;50</td>
<td>$10,000</td>
</tr>
<tr>
<td>50-59</td>
<td>$11,000</td>
</tr>
<tr>
<td>60-69</td>
<td>$12,000</td>
</tr>
<tr>
<td>70-79</td>
<td>$13,000</td>
</tr>
<tr>
<td>80-89</td>
<td>$14,000</td>
</tr>
<tr>
<td>90+</td>
<td>$15,000</td>
</tr>
</tbody>
</table>
Club Sports- Transition Policy

- Each club sport shall indicate whether they wish to opt-in or opt-out by a TBA deadline.

- For Fall 2015, cap will be determined by:
  - Actual Spring 2015 deposits
  - Projected Fall 2015 deposits

- For Spring 2016, cap will be determined by:
  - Actual Spring 2015 deposits
  - Actual Fall 2015 deposits