

Annual Allocations | 2018

Funds Available Through Annual Allocations

Two funds are managed through this single process. While the application requirements, timetable, and submission system are the same, the funds are allocated by separate committees from separate pools. For each event/program budget you submit, you will select which committee that individual budget should go to by using the “Type of Funding” field.

Annual Allocations

Annual Allocations is an opportunity for RSOs to apply for funds for their events in the upcoming year. Priority is given to funding annual events or programs that are an integral part of an RSO's programming. Remaining funds are used to support new, thoroughly planned programs. Capital Improvements are not eligible for SGFC Annual Allocations.

CSRSOs and CAT teams applying for on campus events (such as for recruitment) can submit those budgets through SGFC Annual Allocations. Sports Clubs and Programming Coordinating Council RSOs are not eligible for SGFC Annual Allocations funding. Also, SGFC Annual Allocations will not fund any capital improvements.

Community Service Fund - Annual Allocations

Community Service RSOs (or RSOs engaging in community service) can apply to this fund for next year's events and programs that involve service or events for community partners (follow the 50% +1 rule). Additionally, all budgets requested from CSF must have 10% of the cost offset by fundraising.

Annual Allocations Eligibility

Below are the steps you need to complete for your budget to be eligible for consideration by the committees:

1. **Be at least one year old** (mandatory): New organizations approved this academic year will not be eligible to apply for Annual Allocations until next year. You will need to rely on SGFC for funding in the next year.
2. **Have “Active” RSO status** (mandatory): For your organization to be eligible, you must have completed all of the registration requirements and have a status of “active”. If your organization status is “Frozen” the funding website will not permit you to submit new budget requests. Your Advisor can assist you with status inquiries.
3. **Receive Training on Annual Allocations** (mandatory): The training required for your organization will be offered online in the form of a video tutorial with follow-up questions. The individual taking the lead on your Annual Allocations budget **must complete this training before the end of Spring Break**. The Link to the training will be distributed via email and made available on our AnnAl page by 10th week of Winter Quarter.

In addition, you can always review the AnnAl [training videos](#) as needed, but note that credit for training will only be granted to those that complete the online module during the scheduled period.

4. **Meet with a CLI Advisor** (mandatory): RSOs must attend an advisor meeting to discuss their mission, goals, and how those inform budget priorities. These meetings will be based on your RSOs category:

Orange groups will meet with a Peer Advisor

Blue, and Purple groups will meet with their regularly assigned CLI advisor

Green groups will meet with one of the CLI advisor during pooled meeting hours

CSRSOs will all meet with the CSRSO Advisor, Nick Currie

To schedule your required AnnAl meeting, the individual who completed the online training module for your RSO will need to follow a link that will be provided to them via email during First Week of Spring Quarter.

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5. **Attend a Budget Workshop** (optional): Student Government will be hosting several budget workshops. While they are optional, it is highly recommend that you attend.

Monday, April 16 th	6:00 pm - 8:00 pm	SG Office, Reynolds Club Lower Level
Tuesday, April 17 th	7:00 pm - 9:00 pm	SG Office, Reynolds Club Lower Level
Wednesday, April 18 th	6:00 pm - 8:00 pm	SG Office, Reynolds Club Lower Level
Thursday, April 19 th	6:00 pm - 8:00 pm	SG Office, Reynolds Club Lower Level

6. **Submit your budget online** (mandatory): You will be required to build and submit your budget through the funding website: <https://rsofunding.uchicago.edu>. The website opens on Monday, March 19th.

Note: Budgets must be completed and submitted online by Sunday, April 22nd at 11:59pm.

7. **Submit your budget in person** (mandatory): You must submit a paper copy of your budget to the Student Activities Center (RC 001) by **Monday, April 23rd**.

How to Apply for Funding

1. Preparing to Apply

The entire application process will run through the RSO Funding Website, <https://rsofunding.uchicago.edu>.

Access to the RSO Funding website is based on your organization's roster in Blueprint. Your **Primary Contact**, **President**, and **Treasurer** have access to your budget history and application as well as any of your members holding the "**Budget Team**" position. If you need access you should contact your RSO leadership and have them assign you the Budget Team position in the Blueprint roster. If you have difficulty managing your roster or other difficulty accessing the system you can contact your RSO Advisor. Any roster adjustments should update the Funding Website access within 30 minutes. We strongly recommend you confirm all necessary access prior to the weekend the budgets are due, however, in case you run into any difficulties!

The website also contains an AnnAl budget history for your organization as well as information and links that you should review before applying, such as the SGFC Guidelines and Cost Guide. The Annual Allocations committee will follow these guides when reviewing budgets, so you should make sure to be familiar with their contents.

2. Getting Started

When you have reviewed the documentation on the funding website and are ready to start building a budget click on the "Review/Submit a Budget" link on the left. If you hold privileged officer positions in multiple organizations each should show up on this page.

3. Updating your RSO Profile

Double check to make sure the information in your RSO Profile is up to date, including your budget contacts and account information. This profile will serve as a header to your entire Annual Allocations request.

4. Pre-Populated Events

Your organization's budgets from last year will be pre-populated on the assumption that many of them are for annual events. You can update or delete your pre-populated budgets. Last year's budgets will already contain your budget descriptions, line items, and allocation amounts from last year. You will need to include new date/time information for your event as well as complete the "Spent This Year" and "Request Amount" fields.

Note: These budgets are not automatically submitted, and you must open and update or delete each one.

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5. Adding a New Event

Click “Add Event” under the New Funding Requests section to start entering a new budget. You should submit budgets for events/programs you have planned for next year about which you know enough to put together a thorough budget. Each event/program should be added to your budget as a separate event.

6. Enter your Budget Information

Please provide all requested information and answer the questions on the Funding Request as fully as possible so that the committee can accurately understand your request. The budget you enter should be detailed and itemized. Take some time to think and make sure you are including all expenses for the event; don’t forget things like publicity costs and room fees! If you are going to conduct fundraising for an event or sell tickets, don’t forget to include that income in your budget.

We hope that many of the fields are self-explanatory, but here are some notes about individual fields you may find helpful.

- a. **Type of Funding:** This selection determines whether the event budget you’re working on goes to Annual Allocations or the Community Service Fund. Make sure to review the criteria for each fund and select the correct committee. Items routed to the wrong committee will not be able to be shifted to the other committee during deliberations.
- b. **Event Ranking:** Think carefully about the priority ranking of your budgets, as the committee will use these rankings to determine which budgets to fund if they don’t have the capacity to fund all of your items. Items they cannot fund will be eligible for SGFC next year.
- c. **Frequency of Event:** This field allows you to let the committee know how frequently your event occurs. If you are asking for funds for an event with multiple instances within one budget make sure to select a weekly, monthly, or quarterly frequency so that the committee knows the funds requested are for multiple events.
- d. **Description:** This field should convey the nature and purpose of your event/program. While the field appears small, you can enter as much information as you need to make sure the committee can understand your event or program.
- e. **Anticipated Admissions:** Any amount you expect to raise through ticket sales or event registration fees. This amount needs to be included as an income line in the budget (with a negative total).
- f. **Other Fund Sources:** Let the committee know what other sources of funding you have for the event as well as how much fundraising you are committing to undertake toward the cost of the budget. These amounts need to be included as income lines in the budget (with negative totals).
- g. **Member Notes:** Here you can add any additional comments you’d like to pass to the committee.
- h. **Request Last Year:** If you applied for SG funds for this item previously (Annual Allocations, SGFC, or CSF) this field is the amount you requested.
- i. **Granted Last Year:** The amount of funding you received for this item for this year.
- j. **Spent This Year:** The actual amount you spent on this item when putting on the event/program this year.
- k. **Requested Amount:** These are your estimates for what you think the item will cost in the next year. This is the amount of funding you are asking from the committee. All of your income toward the event or program should be entered as line items with negative totals in this field.

7. Save your Budget

You should now save the event budget using the “Save and Continue” button at the bottom of the form. You can come back to saved budgets and make adjustments up until your budget has been submitted. Remember that saved budgets have not been submitted to your advisor or the committee. *It is also a good idea to save your progress regularly, as the system will time out eventually.*

8. Attach Quotes and Documents

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Once your request form is complete and has been saved, attach any quotes or documentation you would like to submit with the Supporting Documents tool. Quotes are required for airfare, and short bios of speakers are required when requesting funds for honoraria, but quotes for other expenses are also helpful (especially large or potentially unique requests). Attach any quotes you have to help the committee see how you came up your budget numbers. *Uploaded documents should be named to correspond with the event to which they pertain.*

9. Add More Events or Finish and Submit

At this point you can go on to add additional events to your request by repeating the steps above, or you can finish up and submit.

10. Print your Budget

Once all of your events are entered and complete make sure to click “Final Review & Submit Request.” At this point you need to print your request (*before clicking “Submit Budget Request”*). A printed copy must be turned in to the Student Activities Center (RC001) by **Monday, April 23rd** (the day after online submission is due).

11. Submit your Budget through the Website

After you have printed your completed budget you are ready to submit it. In the “Final Review & Submit Request” page, you need to click “Submit Budget Request.” Until you’ve clicked this submit function, your budget is simply saved, and not passed along to the committee. Failure to submit saved budgets will result in a late budget, which may not be accepted by the committee. **Budgets are due by Sunday, April 22nd at 11:59pm.**

Budget Review

Once the deadline has arrived, all submitted budgets for groups who have met all of the Annual Allocations eligibility requirements are available to the committee. The committee will meet over several days during 5th Week.

Unlike SGFC, you will not all organizations will make a presentation to the committee. Only RSOs in the Purple Category of the RSO Advising Model will be scheduled a time to meet with the committee. For other organizations, a detailed and thoughtful budget and use of the optional Budget Workshops will be key to making sure your plans and concerns are understood.

Announcement of Funding Decisions

SGFC AnnAI Decisions will be available on the RSO Funding Website on **Wednesday, May 2nd**;

CSF AnnAI Decisions will be available on the RSO Funding Website on **Thursday, May 10th**.

You can review your allocations by logging in, and on the bottom of your RSOs funding page selecting “*View Final Allocations*”.

Appeals Process

You will have the opportunity to appeal any decision reached by the committees. If you feel your budget, priorities, or revenue sources were misunderstood by the committee, we recommend reaching out to your advisor and the committee chair right away. Formal statements of appeal (based on the budget as originally submitted) will be due to your Advisor and the Committee Chair in the week following the announcement of funding decisions.

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SGFC AnnAI Appeals due by noon on **Wednesday, May 9th**; decisions will follow on **Friday, May 18th**.
Email your appeals to your Advisor and the AnnAI Chair, John Van Den Anker, jvandenanker@uchicago.edu.

CSF AnnAI Appeals due by noon on **Thursday, May 17th**; decisions will be announced during **Week 9**.
Email your appeals to your Advisor and the CSF AnnAI Chair, Brett Barbin at barbinb@uchicago.edu.

Where Can You Get More Information?

Most of this information is available on the funding website itself.
<https://rsofunding.uchicago.edu>.

The Center for Leadership and Involvement Annual Allocations webpage contains lots of helpful information.
<https://leadership.uchicago.edu/annual-allocations>.

You can also get in touch with your RSO advisor or any member of the committee:

RSO Advisors:

- ◆ Derek Bundy: dcbundy@uchicago.edu
- ◆ Nick Currie: ncurrie@uchicago.edu
- ◆ Tempris Daniels: tedaniels@uchicago.edu
- ◆ Carrie Grogan: groganc@uchicago.edu
- ◆ Jennifer Kennedy: jenken@uchicago.edu
- ◆ Jeff Nilsen: jnilsen2@uchicago.edu
- ◆ Karen Pryor: kcp@uchicago.edu
- ◆ Casey Talbot: ctalbot@uchicago.edu
- ◆ Peer Advisors: uchicagopeeradvisors@gmail.com

SGFC Annual Allocations Committee Members:

- ◆ John Van Den Anker (Chair): jvandenanker@uchicago.edu
- ◆ Sabine Nau (SG VP): sabinemnau@uchicago.edu
- ◆ Arthur Lundberg (AnnAI Advisor): lanthrie@uchicago.edu

CSF Annual Allocations:

- ◆ Brett Barbin (Chair): barbinb@uchicago.edu
- ◆ Peer Advisors (CSRSO Interns): csrso.ucsc@gmail.com
- ◆ Nick Currie (UCSC Advisor): ncurrie@uchicago.edu