

Allocations Board End of Year Report

2012-2013 Academic Year

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(1) INTRODUCTION AND PURPOSE

The Allocations Board is an organization tasked with distributing a portion of the Undergraduate Student Fee to on and off campus events held by undergraduate student organizations. The AB is composed entirely of undergraduates from across BU's schools, residence halls, and student groups. Though each member attends every Monday night meeting and staffs our desk at the Student Activities Office, members receive no compensation other than the pleasure of subsidizing and encouraging great student programming.

The primary purpose of this report is to provide transparency into the steps the Allocations Board has taken to improve the funding process as well as to shed light on how policy changes which affect the Allocations Board are made. We provide a summary of our recent policy decisions in the past year, as well as insight on the recent Town Hall Meeting hosted by the AB. The Board gives great thought to creating policies which make funding more efficient and easier for student leaders. In order to explain the rationale behind current policies and their benefits, we have broken down some of our day to day internal operations. We take great pride in the work we do and hope that this report illustrates the tremendous efforts the Board has made to maximize the impact of our portion of the Undergraduate Student Fee.

(2) TOWN HALL MEETING, MARCH 5, 2012

AB aims to represent the undergraduate student body when making decisions as to the best utilization of the Undergraduate Students Fee. This summary is meant to provide a holistic description of the pros, cons, and questions that were raised during the Town Hall Meeting on March 5, 2013. This policy has been determined by the administration of SAO with no input from the Allocations Board. **Our goal in this summary is simply to consolidate the information and present it in a transparent manner.**

There have been many questions raised by the undergraduate student body of Boston University in regards to the recent SAO policy change which will require any philanthropic event, held by an SAO recognized student group and funded by the Allocations Board, to donate only its profits. By profits we mean the total revenue of an event minus its expenses covered by the Undergraduate Student Fee.

For example, an event costs \$1000. If the group is funded \$500 by AB, and they then raise \$2000 in total revenue, they may only donate \$1500 (\$2000 - \$500). If the group raised only \$100, they would not “owe” the AB \$400 (\$100 - \$500) but would simply not be able to donate. **As of this point, the Administration does not plan on having allocated funds returned to the AB but, instead, stay in the student group accounts for future events.** Money raised for the internal workings of the group will not be affected by this new policy.

The Town Hall Meeting was meant to introduce student groups to the potential policy change and gain an understanding of their concerns. We were not aware that the policy had already been decided upon. The concerns were then supposed to be compiled and presented in a conversation with Assistant Dean of Students and Director of SAO, John Battaglino, in an attempt to have an exploratory conversation for alternative solutions. All philanthropic organizations that had held charitable events were contacted via email. The Meeting was also advertised by word of mouth and through the use of social media (Facebook and Twitter). Attendance at the event was high with approximately 200 students. Student concerns were recorded during the meeting in a spreadsheet which was uploaded after the meeting onto the AB website. Additionally, the Allocations Board posted a statement regarding our own opinion of the policy. However, after the Meeting, there was no discussion about alternative policy prescriptions or efforts to soothe tensions with the student body.

(2.A) MEETING SUMMARY:

Dean Battaglino spoke at the event and elaborated on the benefits of this policy. He argued that this would provide more real world experience to student groups since it is rare for independent philanthropic organizations to receive funding on this scale. It also encourages student groups to seek alternative sources of funding and program philanthropic events that focus on profitability. Moreover, since the money will be “recycled” within BU, it should increase the amount of funding by the AB.

Students who attended the meeting expressed several concerns with this new policy. First, for events to be able to donate the same amount as they have in the past, they will need to substantially increase ticket prices. Second, this increase in ticket prices will negatively affect attendance. Dean Battaglino, however, suggested that the ideal philanthropic event is one that is free of charge to BU students with a “voluntary donation” box. The administration hopes that this policy will not increase ticket prices but rather encourage events that do not direct their revenue to charity.

Student leaders also claimed that students attend charity events in order to come together for a common cause. With this policy, many are worried about a decreased incentive to host large-scale events because it would decrease the pride associated with such events.

Additionally, many have asked what is wrong with the status quo. The administration has mentioned that without this policy, portions of the Undergraduate Student Fee will continue to leave campus. Groups will use the retained money that can no longer be donated to increase the size of their account and, theoretically, allow them to become more financially independent, needing less funding from the AB for future events.

Another concern voiced by student leaders was the high expense in throwing an event on campus. They argue that many university services, such as BUPD and RSIG requirements, Catering on the Charles restrictions, and FM&P costs make events far too expensive to raise any amount of money. Unfortunately the Administration has not engaged in this topic and no proposal for change is currently underway.

(2.B) IMPLICATIONS AND DATA:

The exact logistics and details of this policy have yet to be formalized by the staff of the Student Activities Office. However, certain facts are clear. This policy will ensure that no money funded by the Allocations Board is indirectly donated to a charitable organization outside the university. There are two potential outcomes: 1) it will increase the amount of money available on campus to hold future events, thereby increasing programming or 2) decrease the incentives for groups to organize these events, thereby

decreasing programming on campus. The Allocations Board believes that this policy will result in a decrease in programming on campus. Additionally, the AB believes that money retained by student groups will not reduce their requests for additional funds but will instead be used items currently not funded by our policies (e.g. food for general meetings).

For 2011-2012, the last year for which we have complete data, 15% of total requests seen by the Allocations Board were for philanthropic events. After expenses, approximately 5% of the AB's total budget eventually ended up being donated to charity. **Therefore, even if the funds are fully recycled as the Administration hopes, this policy directly affects 15% of the events we fund while effectively increasing our budget by only 5%.**

As of March 30, there were 58 charitable events held on campus of which AB funded 34. We fund philanthropic events approximately 67% of their requested amount. Therefore, out of these 34, only 15 actually raised more funds than their total costs, even when including AB funds. However, with this new policy, only 6 would still make donations. In other words, if we were to apply this policy this year, only 17% of philanthropic events would successfully donate. Thus, philanthropic events rarely make more than their total costs. **For students who have committed dozens of hours in planning events, having nothing to show for their efforts can be extremely demoralizing and may discourage them from programming future events.**

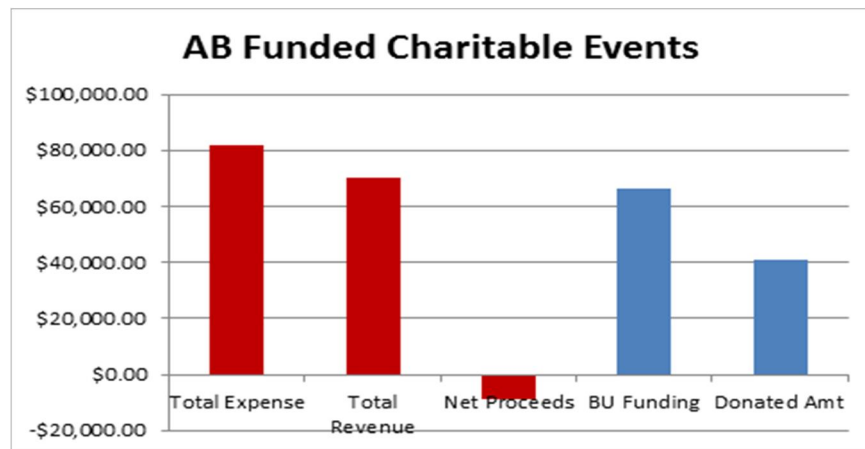


FIGURE 1: BREAKDOWN OF PHILANTHROPIC EVENTS

Additionally, the AB has searched our data to put some quantitative analysis behind the criticism students have about the high costs of BU services such as FM&P, SPS, BUPD, RSIG, location fees, media service, advertising, and tickets. Though we do not have comparable service fees by which to compare costs, we can look at costs as a fraction of our budget: 38% of the costs that student groups requested are used to pay for BU services. The Allocations Board, however, is able to fund only 64% of the total requested amount. This means that 60% of AB funds pay for BU services, which are essential to the event. This

calculation does not take into account food or Catering on the Charles costs. The chart below shows that the Allocations Board has substantially increased the percentage of its funds that go towards BU services.

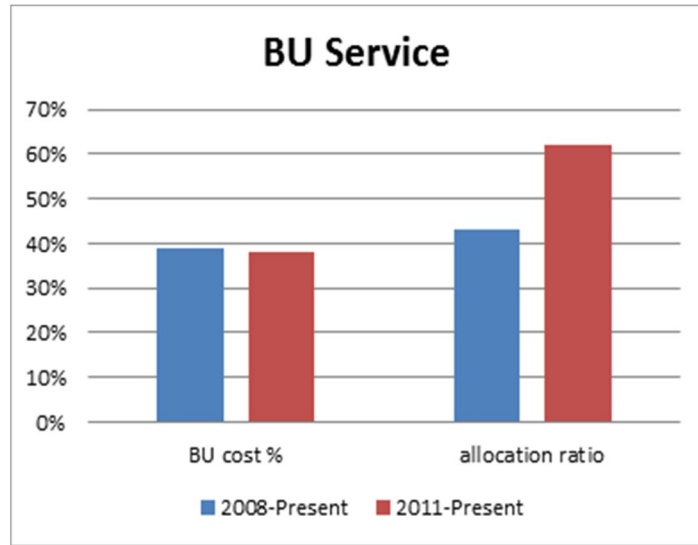


FIGURE 2: BU SERVICES AS PERCENTAGE OF TOTAL REQUESTS AND OF TOTAL ALLOCATED AMOUNT

(3) RECENT POLICY CHANGES

(3.A) ADVERTISING, PROGRAMS, AND BOOKLETS

The Allocations Board continuously reexamines our policies to ensure the best use of the USF as well as minimizing restrictions and red tape for student leaders. Items such as advertising, programs, and booklets were previously not funded by AB as they were deemed a minor cost that was unessential to the purpose of events. The decision to fund advertising began in the Spring semester of 2012 after receiving input from student leaders. We concluded that formal advertising, such as posters and fliers, are important to increase attendance and, therefore, important for the success of these events. Similarly, we came to the conclusion that programs and booklets for performance-based groups were necessary costs for these large-scale productions.

(3.B) TRAVEL: INTERNATIONAL AND PER-PERSON

Even though the primary goal of the USF is to increase the quality of student life on campus, a portion of the Allocations Board budget goes towards funding travel events. We believe that travel is a necessary aspect for many student groups who use those opportunities to compete, perform, and spread BU's name as well as to meet at conventions and leadership retreats which foster creative ideas and develop organizational structure back on campus. AB has changed our travel policy in order to stretch our budget that much further.

Currently AB has set aside 20% of its total budget for travel events, a considerable portion when considering the primary mission of the USF. When funding travel events, our aim is to subsidize the costs as much as possible for participants in proportion to what we believe the event will bring back to campus life. **Since the bulk of the benefits of travel events are enjoyed by those who travel, we believe that the majority of the costs should be borne by the participants themselves.**

We realized that several groups held events in international locations, such as Honduras and Panama, that were proportionally more expensive and tended to include fewer students. After looking at our 2011-2012 figures, we determined that 10% of our travel budget goes to international events. When looking at the per-person costs, however, we discovered that despite the large amount of funds allocated towards these events, we weren't significantly reducing the costs for individuals: for many of these events, students each had to pay over \$700 for international travel while we had only been able to subsidize

approximately \$20 per person. **Therefore, in order to get better value for each dollar, the Allocations Board instituted a new policy in the Fall of 2012 that we will no longer fund international travel** (note that SAO defines international travel as outside the contiguous US and Canada). This allows us to use those same dollars to either significantly reduce costs for more local travel events or fund additional students to participate.

Similarly, **at the beginning of the Fall semester in 2012, AB began funding travel events on a per person basis.** For example, in the past, if an event is funded \$1000 and we were told 10 people were planning on going but only 4 students actually end up going, the group would still receive the same \$1000 which subsidized each attendee more than the Board had initially intended. In many cases, groups were overestimating the number of attendees for their travel events in order to get a larger allocation. Our new policy solves this; for that same event, we would fund the event \$1000 or \$100 per person. If 4 people attend, they will only be eligible to receive \$400 of their total allocation.

(4) INTERNAL OPERATIONS

(4.A) ROLLING AUDIT

Starting in 2011-2012, the Allocations Board switched our funding model to better coincide with how student groups actually program events. We began funding all requests “on the spot” whereby groups would ask for money as they planned their events (as opposed to requesting everything a semester in advance). Two weeks after the event occurred, we “take back” any money that was allocated but had not been signed-off. In this way, we “recycled” unused money during the year so as to maximize our budget. Because many of the costs groups request funding for are based on estimates, there are times when the true costs are less than what we funded. Similarly, for a variety of reasons, events get cancelled after we have funded them. Previously, we would not track these unused funds until the summer audit. With the rolling audit, our budget better reflects the actual money we have left. **Last year, the rolling audit effectively increased our budget by 20%** due to the reuse of previously allocated money.

(4.B) INCENTIVES TO INCREASE PROGRAMMING

As has been apparent throughout SAO, student programming on campus has decreased dramatically over the past few years. We’ve reached out to student group leaders to see why programming has declined and the answer we kept getting was that planning events is a difficult, long, and convoluted process that many students, with an already full class load, are increasingly avoiding. As we can see from the figure below, requests have plummeted since 2011.

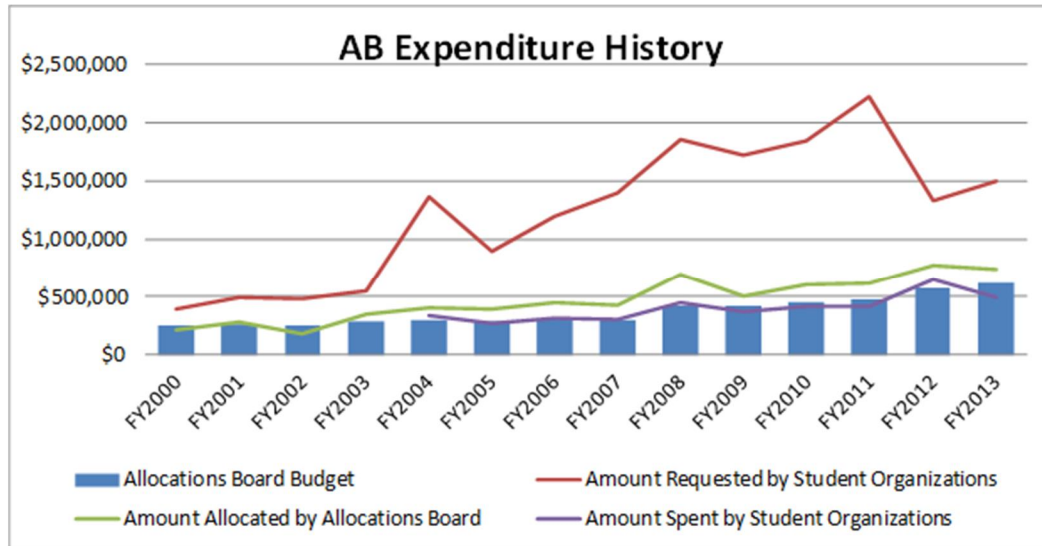


FIGURE 3: EVENT REQUESTS BY DOLLAR AMOUNT

We have always had a Program of the Year Award where we give \$500, no strings attached, to the group who we deem had the best event based on our funding criteria such as providing a unique experience, geared to a large and diverse audience, etc. **To increase incentives for groups to hold good events, we began a Program of the Month Award,** starting in September, with a similar \$100, no strings attached prize. We include the winners on our website and on our poster board by our desk in SAO to promote the group’s achievement. We hope that these small incentives can encourage student leaders to invest the time and energy in programming events on campus.

(4.C) DETAILED MEETING MINUTES

One of the biggest criticisms students have long had about the Allocations Board is that we are a “black box” where requests come in and decisions come out but our reasoning is never clear. We used to send out individual emails to every group informing them of our decision and rationale but, because they were written by different members during their office hours, they were of varying quality and could be sent several days after the decision had been made. Additionally, groups could never see our decisions for other events or groups, especially those that may be very similar to their own.

Initially, we were told that funding information was the private information of the groups and, therefore, could not be shared publicly. However, after discussing with Gina Galland, our advisor, we realized that our funding decisions were our own information, not the particular groups’ and, as such, could be shared to any and all BU students. **Therefore, beginning in Spring 2013, we instituted new detailed minutes where any member of BU can sign in with their Kerberos password to view all of the decisions and reasons**

for each event in a given meeting. Because the secretary writes these detailed minutes as the meeting is underway, the format is standardized and published by midnight of that same day. This standardized format not only increases transparency, it allows us to better communicate other information, such as changes in policy, to student leaders.

The feedback has been extremely positive; students are better able to understand our decisions and put their own events into the context of broader campus-wide activities. It has also helped groups better plan their events by seeing what others have done. We've had significantly less miscommunication with groups and have cut down tremendously on the frustration we saw from student leaders trying to grapple with our decisions.

(4.D) UPDATED EVENT SUBMISSION FORMS

The Allocations Board has long struggled with our funding database. In the past, the system has crashed and deleted information at random. As our policies changed, the functionality of the database became increasingly antiquated. In fact, instead of functioning as a single source for all of our needs, the AB utilized a Google document to keep track of sign-offs and an Excel spreadsheet for the working budget. However, in 2011-2012, our funding database became incompatible with most web browsers, effectively preventing groups from entering details or comments. This information is vital in helping the AB make funding decisions. This was the final straw and forced us to either renovate the database or contract a firm to design a new one from scratch that could suit all the needs of the Board.

The idea of repairing the database was explored and after several meetings with Professor Aaron Stevens from the Computer Science department, we concluded that the database was beyond repair. After several additional meetings, the AB formalized what design features we would need in a new database. We approached Professor Stevens as he had worked with Allocations Board in past years making minor fixes to the existing database. However, based on his past experience where it took him almost an entire year to receive compensation for his work, Professor Stevens insisted we finalize the terms of the agreement before he started working on the database. The details were passed on to the Dean of Students Office and eventually the University Lawyers to draft a contract, at which point it was stopped: it was considered an inappropriate expenditure outside of the Professor's contract with the University and was a task better suited to an external firm than a singular person. Dean Battaglino promised to explore companies who could create the database as well as determine sources of funding the project. However, with the new school year fast approaching and requests already mounting, the Allocations Board Executive Board worked to create an online form through our website which could temporarily solve the crisis. Though we believe that the current format is unsustainable, there has been no progress on receiving a new database.

(4.E) CHANGE IN WEEKLY MEETING LOCATION

We have our weekly meetings in the GSU Academy Room every academic Monday at 6:00PM. Our meetings are open to the BU community and we welcome representatives from student groups to present their funding requests to the board in person. In past years, meetings were held on the third floor of GSU in the Delaware Room. Moving to the Academy room has provided us with a more accessible locations and has resulted in a dramatic increase in attending students. This move was to provide more accessibility to BU students and, therefore, increase transparency in our funding decisions

(4.F) CHANGE IN OFFICE LOCATION

AB members hold office hours every week at our desk in the resource room of the Student Activities Office. The Allocations Board Office was previously located in a room in the back of the SAO office but was secluded location and difficult to find.

Our new location, as of Fall 2012, has greatly helped AB as well as the groups we fund. We are now able to better communicate with SAO staff who can more easily direct students to us for questions. Our physical presence in the same room as the ACs has allowed us to become a much more significant present within SAO. Our Office Hour schedule can be found at <http://bu.edu/allocate/calendar/office-hours/>

(4.G) UNIVERSITY CALENDER

Since we allocate the USF to improve student life, we generally only fund events that are open to the entire BU community. In order to ensure that these events are accessible to other students on campus, we now require, as of Spring 2013, that all on campus events we fund be listed on the University Calendar.

(4.H) MEMBERSHIP PROCESS

The AB also worked to institute a more streamlined membership process. A committee was created to draft a new membership questionnaire that would get prospective members thinking about the complexities of our funding policies as well as the responsibilities and requirements of being an AB member. The membership process was also modified to include a half-hour of shadowing an AB member at his office hour so that prospective members get a more rounded perspective to the work that goes on outside of meetings.

In addition, we have also actively reached out to students involved in groups currently not represented on the Allocations Board in order to ensure that our views are diverse and represent the undergraduate community as well as possible.

(4.I) LUMP SUM FUNDING

Beginning in Fall 2010, the Allocations Board began funding groups a lump sum amount for each event rather than by line item. For example, the AB used to fund an event \$100 for SPS and \$50 for FM&P. If the costs changed such that FM&P cost \$100 and SPS cost \$50, groups would have to appeal to the Board, waiting a full week before they could transfer their funds. This was extremely inefficient and frustrating for groups. Now, instead of allocating a specific amount for each cost, the event is allocated a “lump sum” or total allocation, which the group can decide the particular cost breakdown for sign-offs (as long as the costs are in line with AB and SAO policies). This change allows for easier budget management by the groups as well as accounting for the Allocations Board. As always, if the costs of an event exceed the total allocation, the group can appeal for additional funds.

(4.J) AB REPRESENTATION WITHIN THE UNIVERSITY

The Allocations Board has taken multiple steps to increase its presence on campus and attain an active role in the student body population. The Chair of the Board meets regularly with the presidents of Student Government, Programming Council, Residence Hall Associations’ Overarching Executive Council and the College Governments’ Presidents’ Council to communicate policy changes and on-going projects. In addition, a Student Government Liaison sits in on each Allocations Board meeting and gives regular updates on our operations, problems, and concerns at Student Government Senate Meetings. Representatives from the Allocations Board can also be found at the Boston University Arts Initiative and the newly-formed Student Involvement Board.

Moreover, every Allocations Board member is required to attend 3 events per semester held by organizations to which they are not directly affiliated. Following the event, the attending AB member meets with an Executive Board member of the student organization to see what, if any, troubles they faced in planning the event or gathering funds. This ensures that AB members see the finished products that we fund and, more importantly, that the student leaders planning the event have a resource to discuss any issues.

The Allocations Board has increased its presence on campus in other ways as well, particularly by using social media. We live-tweet our weekly meetings and post regular updates on our Facebook page. Each member is also required to hold one office hour each

week in the SAO Resource Room where we reply to emails, answer phone calls, and address any AB-related questions from student leaders filling out paperwork.

(5) CHALLENGES WE FACE

(5.A) SURPLUS

When we fund events, especially in the beginning of the year, we try to allocate so as to ensure consistency throughout the year. Because we never know how much programming will occur later in the year, this means that, for much of the time, we are simply left guessing. **This means we fund events doing our best to ensure that enough funds are available later in the year, particularly March and April, so that groups are not penalized for having events in the Spring.**

Last year, when we switched to the Rolling Audit (see section (4.a) Rolling audit), our primary concern was how this might affect requests. In particular, we were unsure how much money we would “get back” due to the new system and if that might affect the way students plan events. As such, we spent significant energy tracking the timing of the requests, both in quantity and dollar amounts, so as to better help us plan our spending in future years (see figures below). **Because of the great uncertainty surrounding the Rolling Audit last year, we were left with a budget surplus of just under \$30,000 (approximately 4.5% of our total budget).** Though we aim to end each year at \$0, given the huge fundamental change to our systems, we are very proud of the work we accomplished.

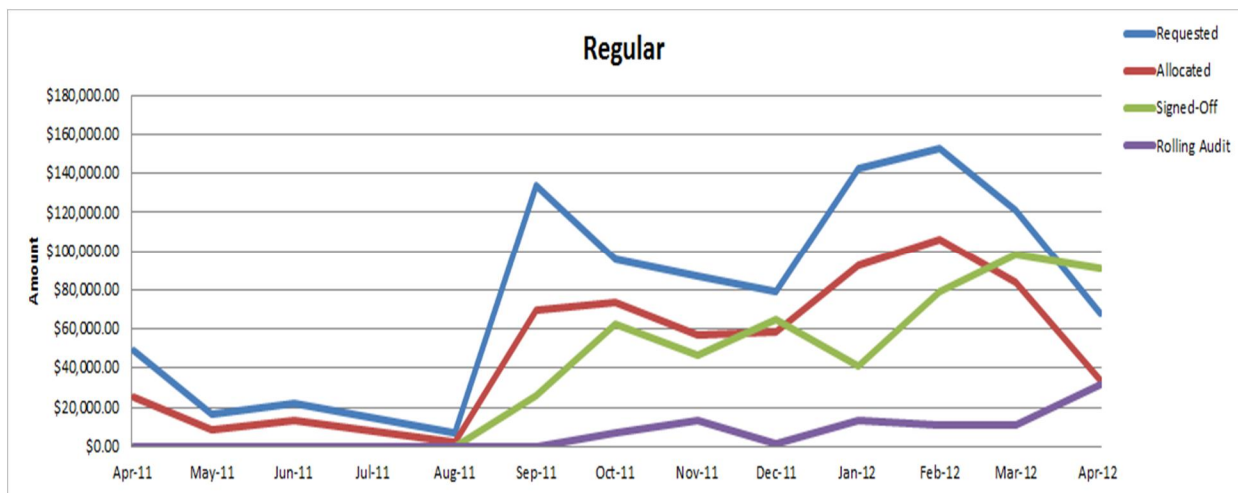


FIGURE 4: REGULAR FUNDING REQUESTS BY DOLLAR AMOUNTS, 2011-2012

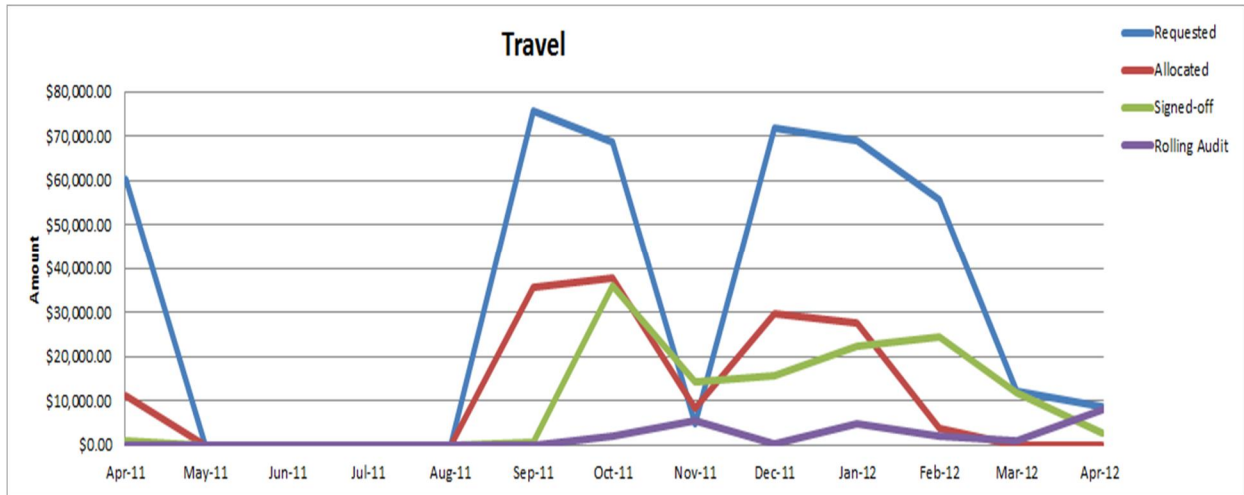


FIGURE 5: TRAVEL FUNDING REQUESTS BY DOLLAR AMOUNTS, 2011-2012

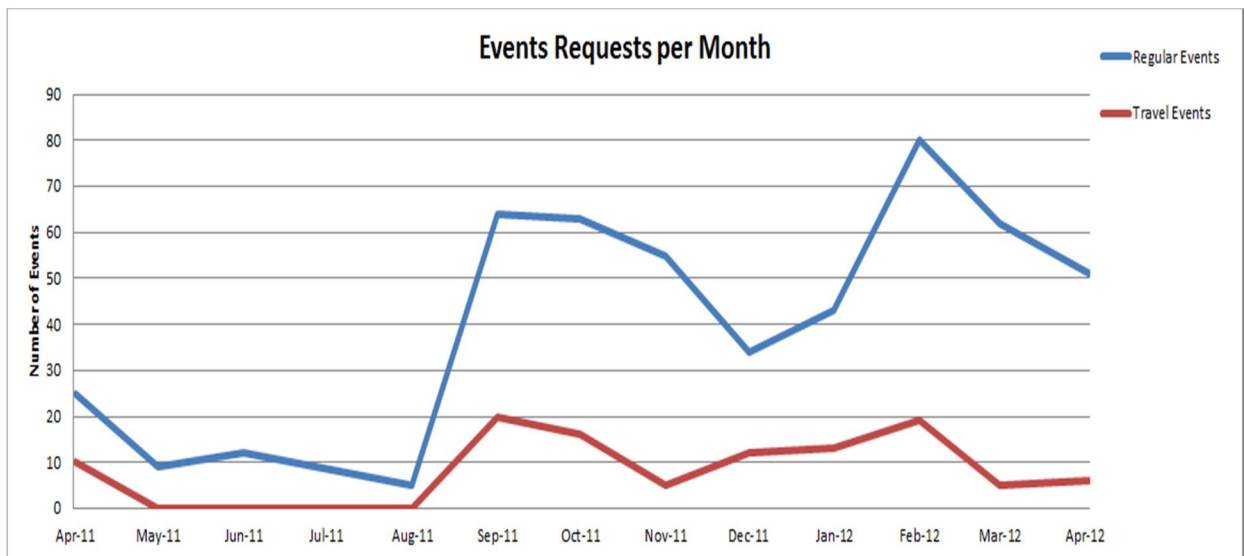


FIGURE 6: EVENT REQUESTS BY NUMBER OF EVENTS, 2011-2012

Additionally, the Rolling Audit procedure has helped us to accurately disperse funds: the previous year (2010-2011), our budget surplus was approximately 17%. This unfortunate circumstance occurred because 2008-2009 suffered from a significant budget deficit due to the financial crisis forcing many students to withdraw enrollment, therefore significantly changing our budget in the middle of the year. To compensate for that exogenous shock, the AB tended to fund much more conservatively over the next two academic years. Starting in 2011-2012, however, we have reverted back to funding events more generously. **It is important to keep in mind, however, that all surplus funds are simply rolled over into our budget for the following year. This year, the Allocations Board exhausted its budget on April 8th.**

(5.B) DENIED EVENTS

As of March 30, the Allocations Board has denied 53 events, representing 10% of the total event requests. Of the 53 denied events, 36 are regular (i.e. on-campus) events and 17 are travel events. **It is important to note, however, that on average, the events we do fund receive only about 65% of their requested amount.**

Of the 36 regular events that were denied, 6 were bake sales or T-shirt sales, which are ineligible due to SAO policies on the resale of items to BU students. Additionally, 8 were for general business expenses, 6 were for recruitment events, and 6 were for retreats, all of which are considered for the exclusive benefit of the group members. Thus 72% of the denied regular events were either against SAO policy or exclusively for the benefit of the group.

For the 17 travel events that were denied, 7 were international, which is against our new policy (see (3.B) Travel: International and Per-Person) while 10 were retreats for members of the group.

In general, events are denied funding because they are deemed to be for the exclusive benefit of the group, are not open to all undergraduates, or seek to use money for items deemed an inappropriate use of USF (e.g. buying T-shirts for members, food for general meetings, etc.). **Outright denial of funding requests, however, is very rare.**

(5.C) JOINT PROGRAMMING WORKSHOP

Until 2011, the Allocations Board required all student groups to send at least one Executive Board member to a formal workshop where we would explain funding processes and any changes in policy. Groups that failed to send a member would not be eligible for funding. **We found, however, that this workshop failed to help student leaders because it was not comprehensive; in other words, the workshop only touched on Allocations Board processes and not SAO, SABO, reservations, and other University resources.** Groups had difficulty attending the workshops and scheduling became increasingly difficult as make-up workshop dates mounted. We discontinued the workshops and, instead, created an online presentation available on the home page of our website that student leaders can familiarize themselves with at their own leisure.

In Fall 2012, the Allocations Board tried to organize a collective Allocations Board/Activities Consultant/ Student Activities Business Office workshop where student groups could learn all the tools and information necessary for planning a successful event. This workshop would have centralized training for student leaders and cut down on mistakes and miscommunication for which SAO is infamous. However, the Dean of Students Office rejected the idea because they didn't want groups to have to endure more

mandated workshops in addition to the current Bystander training requirement. **The AB still believes that a comprehensive mandatory workshop is important and necessary to ensure that student leaders have the tools and training to navigate such a large institution as Boston University.** We hope that this subject will be pursued in the future.

(6) CONCLUSION

The Allocations Board is singularly focused on becoming a more efficient and transparent organization. Our job is generally unacknowledged but we value providing student input into the funding process. We are very proud of the progress we have made in the past few years in making the student programming experience a little more intuitive and easier to navigate. We believe that with our experience, we have established ourselves as valuable and responsible resource in the Student Activities Office. We hope that both the student groups we fund and the administration that we assist appreciate our long hours of voluntary work.

Going forward, we will work towards becoming a better resource not only for funding, but also for the Student Activities Office. We will continue towards developing an even better funding process by creating a database that will increase communication between AB and organizations, serve as a good tool for accounting and a reliable resource for statistical analysis. Eventually we hope to become respected partners in administrative decisions regarding student activities given our unique and holistic perspective on student programming.

We realize that there is always room for improvement and rely heavily on feedback and suggestions from students and staff; for instance, the idea of having detailed minutes arose after a conversation with a student who had no prior experience with the AB. As is hopefully evident from this report, we are constantly reevaluating our funding policies and processes. If you have any suggestions, advice, feedback or questions regarding the Allocations Board, please contact us at allocate@bu.edu.

Thank you for your support.

Sincerely,

The Allocations Board Executive Board

Anjali Taneja	Jacob Magid	Yuzhao Wu	Jake Kallarackal	Rohan Vaswani
Chair	Vice-Chair	Treasurer	Director of Operation	Secretary