

**Boston University
Allocations Board
Funding Handbook**

Revised: February 2017

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Can't find what you need to know? E-mail us at allocate@bu.edu.

Introduction

The Allocations Board (AB) is a student run group under the Dean of Students Office responsible for allocating a portion of the Community Service Fee (CSF) to student groups. The CSF is a mandatory charge paid by every undergraduate to facilitate student activities at Boston University.

While AB strives to help all student groups as much as possible, AB serves only to subsidize the cost of events and not to cover all expenses due to the limited amount of funds (relative to the amount requested by semester). AB does not fund groups, but instead funds individual events. The Allocations Board does not decide that one group will get funds, while another will not. Instead, we look at groups' proposals and recommend which events will get funding and how much. These recommendations are forwarded to the Assistant Dean and Executive Director of Student Activities who makes the final decision. This Handbook serves as a useful guide for student groups on AB processes, and highlights the rules and guidelines that AB follows when allocating funds to eligible student groups.

Section 1 | AB Basics and the AB Funding Schedule

AB divides its budget into two semester-based funding periods per academic year. Within each semester, groups may submit two types of program requests: Semester Budget and/or Special Initiative requests. All the semester budgets are submitted to Orgsync before the end of the previous semester. The Special Initiative requests are decided upon every other Monday after the semester decision are rolled out. Allocations Board makes funding decisions on Semester Budget Requests prior to that semester.

Semester Budget Requests

These can be submitted by groups before the start of the semester, and are for on-campus events and events within Boston. Groups can submit as many events as they like but the Allocations Board can only guarantee that we will review 3 events per semester.

Special Initiative Requests

These are for events that were not foreseeable at the start of the semester. It is the responsibility of the student organization to explain in their request how the opportunity for the event arose and why it could not have been anticipated when making the group's semester budget. AB will host a Special Initiative meetings twice a month during the school year, which we strongly suggest groups attend after submitting their Special Initiative requests in order to answer any questions the Board may

have. Student groups can only receive funding for two Special Initiative Requests per year. Other than the criteria for reviewing the request, all funding policies are identical to regular semester budget requests.

To Be Eligible for AB Funding a Group Must

1. Be a registered undergraduate organization within the Student Activities Office and needs to be in good standing.
2. Must be a Beacon or Commonwealth organization in the Square program.
3. Hold events that are within its nature, as stipulated by the group’s constitution.
4. The organization needs to be in good financial standing.

Section 2 | How to Apply for Funding


How to Fill Out a Funding Request

REGULAR REQUEST FORM (Starting Summer 2016, No Travel Forms)

1. *OrgSync*

Groups are required to have an OrgSync account created in order to have their requested viewed by the Allocations Board. To access it, visit [BU’s OrgSync site](#). After logging in, navigate to your group’s portal and click the “Files” tab. On the “Files” page, click the “Allocations Board Info, Request Form, SUSIBU info” folder. Lastly, download the [Allocations Board Funding Request Form](#) PDF.

2. *Program Information*

		ALLOCATION BOARD FUNDING REQUEST	
PROGRAM INFORMATION			
Organization Name	<input type="text" value="Common Grounds Coffee Club"/>	Funding Semester	<input type="text" value="Fall Semester"/>
Contact Person	<input type="text" value="Rhett Terrier"/>	Position	<input type="text" value="Treasurer"/>
		E-mail	<input type="text" value="cgccbu@gmail.com"/>
Reservation #	<input type="text" value="0000000000"/>	Event Location	<input type="text" value="GSU Backcourt"/>
		Event Date (MM/DD/YYYY)	<input type="text" value="10/26/2016"/>

- a. **Group Name:** Please enter your full group name.
- b. **Funding Semester:** Choose Fall or Spring.

- c. **Event Name:** Input name of event.
- d. **Contact Person, Position & E-mail:** Be sure to enter updated contact information.
- e. **Reservation #:** Input Event Reservation number approved by the Student Activities Office (if already provided; if not, leave space blank).
- f. **Date of Event:** Enter day of event. If your event occurs over a few days, or differing days, enter the last day of the event and enter the time range in the “Event Description” section under *Financial Information* along with any other days/times of your event.
- g. **Location of Event:** On-campus rooms must be reserved through the University Reservations office through OrgSync or by contacting them at 617-353-2932. The Office of the Registrar places a freeze on classroom reservations that extend beyond the current semester; AB considers this inconvenience during allocations meetings. However, groups are still expected to provide a tentative location/date and notify AB of the exact date/location when that information is available.

3. *Financial Information*

*Example of a well-written AB Request Form

FINANCIAL INFORMATION

Event Description: Include goals, vision & target audience. Please be very detailed. The more information AB has, the better for recommendations.

Goals: Common Grounds Coffee Club Training will provide a space for students to learn about the production process and brewing of coffee.
 Vision: Common Grounds Coffee Club will bring in a barista from Counter Culture in Somerville
 - Teach participants about their company mission to be socially responsible and promote fair trade, sustainable
 - Showcase different brewing parameters, the differences between the varied brew methods that they see at various specialty coffee shops
 - To create an environment to ask questions and to show that coffee lovers can vary from Dunkin' Donuts lovers to wannabe-baristas to coffee-shop aficionados.
 Target Audience: Any and all students who love or want to love coffee and the coffee industry.

Estimated Cost Breakdown: Include all event expenses here, packages covered by the Package Handbook should be listed as well as expenses paid for by your organization. Please use bullets.

Requesting from AB (\$1732)
 --Eventbrite Fees \$30.00 - Fees for similar size events have been just under \$30 in the past.
 --Groceries & Food \$50.00 - Coffee Beans and Milk for demonstration
 --Industrial Materials & Tools \$500.00 - Espresso machine, Grinder, Equipment Rental
 --Performers, Speaker, Lecturers & Judges \$1,000.00 - Barista Trainer
 --Specialty & Perfect-Bound Printing \$152.00 - Warren towers posters
 Covered by Package Handbook (\$296)
 --SPS (AV Equipment) \$40.00 - Basic Portable System & Labor
 --FM&P (Set up Fees) \$256.00 - Backcourt set-up D
 Covered by CCGC (\$2025)
 --Food & Beverages \$25.00 - Biscotti & Scones
 --Promotional Items \$2,000.00 - T-shirts, coffee mugs and coffee sleeves
 Total Program Costs (\$4053)

Current Account Balance: Program's Anticipated Revenue?

Will you fundraise for this program? NO YES Anticipated Attendance?

What is your plan for fundraising?
 Sell \$750 worth of CGCC items while advertising in the GSU Link. T-shirts -\$10, mugs - \$10

If you have outside sponsorship, please list sponsors and their contributions.
 Pavement Coffeehouse: \$60 (2x\$25 Gift Cards & 2 Coffee Mugs) for giveaways

- a. **Event Description:** This is an important section of a group's request; please include a detailed description of your event (is it a performance, competition, speaker, fundraiser or a combination of these elements, etc.). Include any pertinent information you would like AB to be aware of including goals, vision, target audience, & collaborations with other student groups. Please be very detailed and write at least 150 words. The more information AB has, the better it is for recommendations.
- b. **Cost Breakdown:** Provide detailed event expenses; below are specifications.
- i. **Costs and descriptions:** It is vital that groups list the most up-to-date costs and descriptions they have for any event. Include all event expenses here, packages covered by the Package Handbook should be listed as well as expenses paid for by your organization. Please use bullets. Groups may also attach an excel sheet of the costs in the "Any Attachments" section on the budget page if they feel that would be easier. Examples of potential costs that may be incurred are:
 1. **Paid Speaker/Film/Performer/DJ:** List any and all paid guests performing at the event and enter their fee(s). This is **not** the same as Honoraria, which is an *optional*, non-cash gift that can be given after the person performs their service. Any outside speaker/performer/DJ who is coming to your event and has required costs associated with their service **must** complete a performer contract and must charge your organization a performer/speaker fee. This fee should also include any travel/hotel costs they want your organization to cover. AB will consider funding for speaker fees as long as they are clearly labeled as such. For films, provide the name and a description, and ensure that it is relevant to the nature of the group. Film fees can include funding rights and royalties, but not media rentals (such as video tapes or film reels).
 2. **BU Professor:** List the name(s) of any University employee(s) speaking/performing at the event. BU faculty cannot receive compensation from a student group; this is a contractual term of employment for all university faculty.
 3. **Transportation & Lodging:** Starting Summer of 2016, transportation and lodging are no longer eligible for any funding.
 4. **Registration Fee:** List the registration fee per person in the "Description" box, and the total amount requested in the "Requested" box. Funding for registration fees will be reviewed on a case-by-case basis. Fees for events that are more closely related to the mission of the group (i.e. competition registration fees) will receive more consideration. Application Fees are not

eligible, as there is the possibility that the application will not be accepted, thus providing no benefit to the organization.

5. **Location Fee:** List any fee associated with the location of the event. Check with the Student Activities Office or the outside venue for these costs prior to requesting funds towards them.
6. **Fundraising:** List any fees and expected revenue from fundraising event.
7. **Facilities, Management & Planning (FMP)*:** List any fees associated with the setup and breakdown of the event, including stages, trucking, chair, and associated fees. Standard set-ups in the Package Handbook, as well as building opening/closing fees are covered by the Package Handbook. (Refer to Package Handbook)
8. **Student Production Services (SPS)*:** All expenses associated with SPS and their services. (Refer to Package Handbook)
9. **BUPD* and Additional Security:** All expenses associated with the use of BUPD or other security services. Most large events, controversial events, and events where money will be collected at the door will require a BUPD officer or 3rd party security officer to be present. Officers are requisitioned for a minimum of four hours. Groups should check with the Student Activities Office whether their event will require an officer and for the current hourly rate. (For BUPD refer to Package Handbook).
10. **Learning & Event Technology Services (LETS):** All costs for the use of LETS at your event.
11. **Advertising:** Describe your advertising plans and the associated costs. AB does not fund advertisements in the Daily Free Press.
12. **Facilities, Management & Planning (FMP), Student Production Services (SPS), and BUPD** are all fully covered by AB funds taken out of the CSF; refer to package handbook on OrgSync.

ALLOCATION BOARD FUNDING REQUEST

FINANCIAL INFORMATION con't.

Are you Charging Admission?	NO <input type="radio"/>	YES <input checked="" type="radio"/>	Ticket Price	<input type="text" value="\$ 5.00"/>	Estimated Ticket Revenue	<input type="text" value="\$ 250.00"/>
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Given your responses to the previous questions, summarize for us why you need Allocations Board funding.

Common Grounds needs assistance in funding this event. As a club, we held this event for our own members and found it really valuable and that many non-members were interested. In order to put this on for the greater BU community, we will need assistance in funding \$1732 worth of the expenses. This will be a new annual program open to non-members that we will plan to do at least once a year if not once a semester depending on how it goes. Through our surplus from the 2015-2016 academic year (\$1025), ticket and promotional item sales, our organization will be able to fund \$2025 of what we need to put on this event.

- c. **Current Account Balance:** List your group's total revenue fund account balance from OrgSync.
- d. **Program's Anticipated Revenue:** Calculate an estimated total of revenue (money generated from the event) for all attendees and admissions fee. Please further explain all aspects of your event revenue within the financial information boxes.
- e. **Anticipated Attendance:** Calculate an estimated total of revenue from event.
- f. **Fundraising:** List plan for fundraiser if you are planning to fundraise and expected funds, if applicable.
- g. **Outside Sponsorship:** Are you working with any other groups or expecting funding from a BU school/college or other large organization? List whom and the amount here.
- h. **Charging Admission:** Indicate if your group is charging admissions or any similar fee to attend the event. There must be an admission fee for non-BU students including faculty or staff.
- i. **Ticket Price & Estimated Ticket Revenue:** Please include ticket price and estimated ticket revenue, if applicable.
- j. **Summary for AB Funding:** Given your responses to the previous questions, summarize for us why you need Allocations Board funding. If you have significant costs throughout the semester for things that AB cannot fund, explain that here.

4. Logistics Information

*Example of well-written logistics for event

LOGISTICS INFORMATION

Is this a new program or an annual event? New Annual

Is this a fundraiser for your organization? NO YES

Is this a fundraiser for an outside organization? NO YES

Name of organization

How does this event enhance your organization's mission? (Minimum of 150 words.)
Failure to provide accurate explanation could limit Allocation Board's ability to review your request.

In general coffee is used as a medium for social interaction. We use that crucial trait, building low-stress environments for positive social interaction. BU is a hyper-motivated and high pressure environment, where too often students fail to invest time in self-care. We believe there should be more emphasis placed on spontaneous conversation. We try to create, foster, and inhabit a space to fill that void. We want students to relax, meet new people and learn something about something they love. There are pre-requisites for this program of any kind. We will start with the basics and get a little deeper into the nitty-gritty details about everything coffee. The event will have information on sustainable coffee farmers and roasters, a demonstration on the pour-over, espresso and milk-steaming process, then time for questions and answers and then follow up with a "coffee hours" where we will provide some light coffee snacks (biscottis and scones). The demonstration will focus on tasting and cupping to identify tasting notes in different cups of coffee. Then focusing on details and techniques to have fun tweaking brew parameters in search of the perfect cup of coffee. We would be learning together, pushing the boundaries of our collective coffee knowledge. Before leaving we will also be giving out our pamphlet "The Coffee Connection" that showcases different cafes and roasters in the greater Boston area. This event will create a culture of conversation around coffee and bring back its inherent social nature. Holding this program and hosting the trainer will increase the awareness and accessibility of specialty coffee. We hope that this demonstration will educate individuals on the coffee movement and the sustainability efforts that these coffee producers engage in while providing a platform to engage in learning new skills – be it tasting or brewing, or talking the coffee lingo. We have only opened this event to 50 non-member participants as we pilot the program. In future years we hope to make this available to more students by holding a larger session or by hosting more sessions.

How is this event unique? What does it bring to the BU community?

This event is unique to the BU community because we don't have a forum for students to learn about the coffee culture and/or industry. We have many coffee providers in and around campus (Starbucks, Dunkin' Donuts, Blue State, Pavement, etc.), but no space to learn about it. Students can be intimidated by all the specifics of different coffee drinks and how they differ to the commercialized versions of these drinks. While the Howard Thurman Center hosts Coffee and Conversation as well as Tea Time, students find that those programs are beneficial to a different type of discussion and not specifically learning about Coffee or Tea.

Is this event open to all BU students? NO YES

Rev 07/16

a. **Indicate if:**

- i. Program is new or an annual event
- ii. Fundraiser for organization
- iii. Fundraiser for an outside organization
- iv. Name of organization for fundraiser.

b. **Explaining how event enhance organization's mission: (minimum of 150 words)**

Groups become officially registered based on their primary goals, mission and means of reaching them. For this reason, when allocating the Undergraduate Student Fee (CSF), AB looks at the event's relevance to the group's mission.

c. **How is this event unique? What does it bring back to BU's campus and student**

body? Since it is the Undergraduate Student Fee, we ask how the students paying the fee benefit from the programs and events your group hosts.

d. **Is this event open to all Boston University students?** Because every undergraduate pays the CSF, all AB funded costs may not be for the exclusive benefit of the group.

How to upload AB Request Form

Budget Title

Club Name & Budget Semester (ex. Common Grounds Coffee Club Spring 2017)

Budget Period

Spring 2017

Budget Details

BUDGET ITEM ✕

Item Title

Barista Training and Demo

Category

Training/Workshop

NoLine Item	Description	Request a Budget	Spend from Revenue Fund
Event Expense	Barista Training and Demo	1,73	0.00
+ Add Line Item		\$ 1,732.00	\$ 0.00

Summary

Total for Budget Fund:	\$ 1,732.00
Total for Revenue Fund:	\$ 0.00
Grand Total Requested:	\$ 1,732.00

Upload Documents

If you need to upload scanned or electronic documents, you can do so here. Max file size is 10 MB.

File Name	File Size	Uploaded By	
Common Grounds Coffee Club Spring 2017 AB Request Form.pdf	86 KB	Terry Shin	✕
November 21, 2016 1:24 PM			

Upload

Any Additional Comments?

AB may follow up with your organizations with questions regarding your budget in this section. Respond to those comments so that AB will have a better understanding of your funding request.

Submit

Save & Finish Later

1. On your group's OrgSync page, hover the "More" Tab and scroll down to click the "Treasury" tab. On that page, click "Manage Budgets" under "Budgets." Lastly, click "New Budgets" on the right side of the page to fill out your budget items and to upload the AB request form.
 - a. Budget title should include your organization, the semester, and the year.
 - b. Select the semester budget period for which you are requesting funding,
 - c. Each budget item title should be the event name (see bullet 5)
 - d. The first drop down for each line item should be "Event Expense" – please only use one line item for the entire event expense.

2. Under “Request a Budget,” input entire amount requested for an event.
3. Upload AB Request form under “Upload Documents.”
4. If you have any further attachments you would like AB to see when considering your requests, please feel free to attach them.
5. Click “Add Budget Item” for each new event you are requesting funding for. **Be sure that you are adding a new Budget Item, NOT a new Line Item for each event**
6. All events for the semester should be included in the same Budget Title Request. You should only be submitting one Budget Request.
7. Lastly, make sure all of the entered information is correct and then hit “Submit.” The following image will appear once you hit “Submit” and the Contact E-mail you entered will receive a Form Submission Confirmation email. Once submitted, no further changes may be made to the form. **Be sure to make sure that the uploaded PDF is not blank as a few groups have uploaded empty PDFs.** After submitting your request, e-mail AB at allocate@bu.edu if any changes must be made to the request.
8. For *Special Initiatives*, student groups go through the same process, but when submitting the budget on OrgSync, the Budget Title would be labeled as [Semester Year Special Initiatives] (ex. Spring 2017 Special Initiatives). Additionally, in the field asking to summarize why you need AB funding, please explicitly describe the reason(s) for why this event was not included in the original semester budget request. Use as much detail as necessary to present a compelling reason to the Board. Special Initiative Requests are the only instances when your organization would be submitting more than one Budget Request per semester.

Funding Decisions

Allocations Board has a hearing process that takes place before the end of each semester. The Board reviews the total requested and funds 40% of budget in Fall Semester and 60% in the Spring Semester. Once the Assistant Dean of Students and Executive Director of Student Activities approve AB allocation recommendations, groups can check the status of their requests under “Budgets” (same location as submitting AB Request Form on OrgSync), and click their submitted budgets to see what items/events were funded or denied. AB reserves the right to suspend or rescind funding for events in the cases of fraud or misuse of allocated funds. **AB will not publicly post all funding decisions for everyone to view as our decisions are also affected by need-based, involving student groups’ treasuries.**

Section 3 | Accessing and Using Allocated Funds

After AB approves a group's semester budget, the allocated funds are reserved in the "Budgets" section under a group's "Treasury" tab in OrgSync.

The image shows two screenshots of the Boston University OrgSync interface. The top screenshot displays the main page for the "Boston University Test Club". The navigation menu includes Home, People, Events, Files, Forms, News, and More. The "More" menu is open, showing options like Photos, Discussions, Messaging, Polls, Involvement, To-dos, Treasury (highlighted with a red line and a mouse cursor), Videos, and Website. The "Treasury" section is highlighted in orange. The bottom screenshot shows the "Treasury" page, which is divided into "Budgets" and "Revenue Funds" sections. The "Budgets" section includes a description: "Manage budgeting and activity funding, including submitting a budget request." and a prominent orange button labeled "Manage Budgets". The "Revenue Funds" section includes a description: "See a rolling balance of funds available for your organization, create entries, and view requests." and a button labeled "Manage Revenue Funds".

BOSTON UNIVERSITY Search for anything...

Boston University Test Club

Home People Events Files Forms News More 9 Members Settings

Budgets

Tool in: [Test Club Treasury](#)

Period: 2016-2017 Academic Year

REVENUE FUND (\$150.00)
View Revenue Fund Entries

Submitted	Name	Status	Requested	Approved	Paid
Jun 27, 2016	Fall 2016 Funding	APPROVED	\$2,500.00	\$2,500.00	\$0.00

<https://orasync.com/82810/budget/396067>

BOSTON UNIVERSITY Search for anything...

Date Approved: Jun 27, 2016

Competition/Recreation/Athletic Event

Item Title	Requested	Approved
Fall Competition in Chicago	\$500.00	\$500.00

On-Campus - Performance

Item Title	Requested	Approved
Fall Show	\$2,000.00	\$2,000.00
		Approved: \$2,500.00

Upload Documents
orasync.com/82810/budget/396067/budget_items/768371

In order to access the funds, groups must select the event for which they are looking to access funding and click “Request Payment.”

BOSTON UNIVERSITY Search for anything... 9 Members Settings

Home People Events Files Forms News More

Fall Show: Detailed

Budget Item in: Fall 2016 Funding

Fall Show (On-Campus - Performance)

No.	Line Item	Requested	Approved
1	Allocations Board Request	\$2,000.00	\$2,000.00
Totals:		\$2,000.00	\$2,000.00

Payment Requests (\$2,000.00 Remaining)

orgsync.com/82810/budget/396067/budget_items/.../new

Then, groups must fill out the remaining criteria, including the amount requested from their approved AB budget.

BOSTON UNIVERSITY Search for anything... 7

Phone:

Fall Show (On-Campus - Performance)

No.	Line Item	Remaining Budget Fund	Request Budget Payment	Remaining Revenue Fund	Request Revenue Fund Payment
1	Allocations Board Request	\$2,000.00	100.00	\$0.00	0.00
Totals:		\$2,000.00	\$0.00	\$0.00	\$0.00

Upload Documents

If you need to upload scanned or electronic documents, you can do so here. Max file size is 10 MB.

The screenshot displays the Boston University budget system interface. At the top, there is a header with the Boston University logo and a search bar. Below the header, there is a section for "Upload Documents" with instructions and an "Upload" button. A "Comments" section follows with a text input field and "Submit" and "Save & Finish Later" buttons. The bottom part of the screenshot shows a detailed view of a budget item titled "Fall Show: Detailed" under "Fall 2016 Funding".

Fall Show: Detailed
 Budget Item in: [Fall 2016 Funding](#)

Fall Show (On-Campus - Performance)

No.	Line Item	Requested	Approved
1	Allocations Board Request	\$2,000.00	\$2,000.00
Totals:		\$2,000.00	\$2,000.00

Payment Requests (\$1,900.00 Remaining) Request Payment

Name	Submission Date	Status	Requested	Approved
Fall Show Payment: 10/1/2016: Kinkos	Sep 13, 2016	Pending	\$100.00	\$0.00

Note: Groups must submit supporting documentation (i.e. invoice, price quote, or similar document stating a price for the specific line items) under the “Upload Documents” tab.

Lastly, click submit. All unused funds will revert back to the AB general account two weeks after the event has taken place as per AB’s rolling audit policy. Additionally, AB reserves the right to suspend or rescind funding for events in the cases of fraud or misuse of allocated funds.

Section 4 | AB and the Allocations Process

About the Allocations Board

The Allocations Board is comprised of undergraduates representing students from across campus. To join, you may email AB at allocate@bu.edu to find out how you can join AB. In addition, our Bylaws have more explicit information; though if you are interested in joining AB, we encourage you to stop by a member's office hours.

The Allocations Board protects the interests of all student organizations by ensuring that the decisions it makes are in the best interest of all parties involved, especially the students of Boston University. Board members consider the big picture and make decisions that will benefit the entire University community, keeping in mind that their decisions provide significant financial support for co-curricular life at BU. Although AB strives to help all student groups as much as possible, due to the limited amount of funds, it serves only to subsidize the cost of events and not to cover all expenses.

Furthermore, in order to ensure that events funded by the Allocations Board are open to the BU community, AB requires groups to include events occurring on-campus or in the vicinity of campus to be on the Students Activities Office and University Calendar.

The AB Process

After funding requests are submitted, the Board, as a whole, reviews each request before the fall/spring semester begins. During the allocations meeting, Board members determine the amount of funding each event will receive. Below is an outline of how AB functions during an allocations meeting.

Exceptions to this process are rare; however, the Board may consider exceptions for very extraordinary situations.

The Allocations Board first compares the amount of funds available against the total amount requested by all student groups. AB uses this comparison to estimate how to allocate funds for the entire funding period: the more that requested funds exceed available funds, the more stringent AB is in its allocations. The more financial demand placed on available funds, the more AB will reduce funding to individual events so that funds can reach a greater number of groups. By this processes, AB attempts to subsidize the costs of many groups rather than covering all of the costs of a few groups.

AB Funding Principles and Guidelines

Below is a list of guidelines that AB follows when making its funding decisions. Groups are encouraged to consider these points when applying for funding.

1. AB compares each event against what it feels is the best use of the CSF. The Board feels the best use of the CSF is a program that includes (but is not required to have) the following characteristics:
 - a. On-campus or within walking distance from the University
 - b. Provides a service to the community
 - c. Educates and/or enlightens participants
 - d. Offers a unique or rare opportunity
 - e. Is a step towards financial independence (i.e., the group can raise funds on its own)
 - f. Open to the entire BU community
 - g. Proven to be a major attraction over the years
 - h. Collaborative event between multiple student groups

*Many programs will not meet all of the above criteria. However, the more of these qualities a program contains, the more likely AB is to allocate a higher amount of funding towards it.

2. All programs must fit within the nature of the student group. This means that the program must reflect the purpose or mission of the group. If the program does not fit within the nature of the group, AB reserves the right to deny the request.
3. AB is more likely to fund groups that show in their form that they are contributing to some of the program's expenses. One of AB's principles is to subsidize costs for as many programs as possible in order to enrich the BU community. AB looks for, and appreciates, groups that understand this fundamental principle; the Board is more likely to approve funding if a group lists all costs of the event and then identifies which ones they are paying for out-of-pocket and which ones they are requesting AB funding to cover to explain the total cost for the event and why or the reasoning they are requesting funding.
4. If necessary, AB will review a group's spending history to help make an allocation. Reviewing a group's spending record allows AB to understand how a group utilizes allocated funding. The Board also reserves the right to view and audit a group's current account balance with the Student Activities Office to aid in decisions.
5. AB reserves the right to deny funding to any group. Explanations for funding denials by AB are included in OrgSync Budget Requests Comments Section. Reasons for denying funding include, but are not limited to:
 - a. An improper use of the CSF
 - b. Not in the nature of the group

- c. There are not enough funds available to cover the necessary expenses associated with this event. AB assumes that since it cannot fund the essentials of the program as it is presented in the funding request, the program cannot be executed.
6. Funding decisions are made pending that specific requirement (i.e. SARP) be fulfilled before the funds are transferred to the group's account. This allows the funding request to proceed through the process without being tabled until the requirements are fulfilled; however, if the requirements are not fulfilled approximately 2 weeks post the semester budget hearing, the group may be denied access to those funds.
7. AB reserves the right to suspend or rescind funding for events in the cases of fraud or misuse of allocated funds.

****NOTE:** As of 9/1/16, AB will take into consideration a group's account balances and past year funding allocations (E.g. Costumes, props, etc.) when reviewing funding requests.

What AB Does Not Fund

The Allocations Board has a firm policy on what goods and services are not eligible for funding.

The primary reasons for items/events being ineligible for funding are:

1. Improper use of the CSF: Events that are not open to the entire undergraduate population. AB's budget comes from the CSF, which is charged to every undergraduate student. Therefore, AB funds can only be allocated towards events that benefit the entire undergraduate community.
Note: Exceptions can be made for competitions or other competitive events.
2. Items deemed to be nonessential for the event to take place. AB, with its limited funds, aims to fund only essential costs for an event in attempt to fund the most number of events possible. An example of a nonessential costs is Video Production for an acapella performance. Video Production costs would be nonessential as the video is not necessary for the acapella group to hold the event and perform, but having a video recording could be beneficial for the group to watch post-performance.
3. Anything ineligible under the Student Activities Office and BU policy.
4. Funding payments towards instructors for classes. For example, AB will not fund dance instructors for a student organization to hold dance lessons, as the Student Activities Office cannot conduct a thorough vetting for these instructors. In addition, the Student Activities Office has determined that instructors cannot be funded through AB because AB cannot use its funds to provide salaries. Please visit the Student Activities Office for further clarification to discuss finding instructors.
5. Payments towards religious figures to perform and conduct religious services.
6. Food* unless clearly stated in the form that **the food will be educational and unique for the event.** The purpose of the food must be discussed in the event description.

Examples of Items Not Funded by AB

1. Anything for the Exclusive Benefit of Organization Members* (e.g. t-shirts and sometimes conference registration)
2. Things considered an improper use of the CSF (e.g. alcohol, things not part of group's mission, etc.)
3. BU Faculty Honoraria*
4. Decorations (Non-essential to Event)
5. Food, Beverages, or Catering* (unless unique and educational, see below)
6. Prizes (including trophies, raffle prizes)
7. Letterhead, Envelopes, Business Cards, Invitations, and Printed Tickets
8. Certificates or Membership Cards
9. National Dues
10. Application Fees
11. Splash Items
12. Items Sold Directly to BU Students
 - a. E.g. Production of CDs, Videos to be Sold to BU Students, apparel, etc.
13. Money Going Directly to Charity*

*See Notes Below

Important Notes and Exceptions

1. **Food, Beverages, Catering Services and Decorations:** AB will consider funding food provided it is a unique/cultural AND educational component relevant to the event. It is the group's responsibility to clearly indicate in their request form how they will educate attendees about the importance of the food and its relevance to the theme of the event/mission of the organization. Funding will be further considered if the food supplements cultural and/or religious aspects of the group's mission. AB will also consider funding for Catering on the Charles as an event expense. AB may also fund with the discretion of expected attendance, creativity and other regular funding criteria.

*Note: Student groups are not permitted to have students prepare/cook food at an event. Thus, AB will **not** fund food costs associated with those types of events, even if they otherwise satisfy our policy.*
2. **Honoraria** for a University employee, current BU student, BU alumni within 5 years, or relative of a BU student (defined as mother, father, brother, sister, stepmother, stepfather, step-sibling, half-sibling, spouse, or child) are not funded by AB. This is a Student Activities Office policy.
3. **CD/Video production** used for the sole purpose of competition submissions will be given consideration.

4. **Donating event revenues to charity:** If a student organization receive AB funding to hold a fundraiser in order to raise money for a charity, AB’s Charitable Funds Policy will come into effect. This policy dictates that the money that comes from AB for this event is now a loan, not a grant. Thus, the group must pay AB back the loaned amount with the revenue generated before donating any additional proceeds to their desired charity. If the event raises less than the total AB allocation, then the student group will return all of the money raised to AB, and the remaining difference will be forgiven.

Section 5 | AB Program of the Year Award

AB requests that groups provide board members with two complimentary tickets to each AB funded event to help AB better understand each organization it provides funding to. This also allows the Board to assess the event for AB “Program of the Year” award. The “Program of the Year” application can be found on OrgSync.

The award will go to the program that meets the following requirements:

1. The Program is either partially or entirely funded by AB
2. The Program best exemplifies what the Community Service Fee (CSF) should be used for
3. The Program of the Year application must be completed and submitted prior to the posted deadline (available on OrgSync)

The award will be determined through the following procedure:

1. If student groups feel their AB-funded event should qualify, they are required to submit an application. An AB member may request one or two complimentary tickets to the event in order to better assess the event as a “Program of the Year” candidate. However, an AB member’s attendance at an event is not required for consideration for the Program of the Year Award.
2. At the end of the year, AB members will review the submitted applications and notify the winners.
3. The Allocations Board will transfer the monetary reward to the winning group(s).

Note: AB Program of the Year Award will not be taken into consideration when reviewing budget requests for student groups. For example, receiving the Program of the Year Award will have no effect on AB’s standard decision-making processes with regard to funding groups’ requests. All groups with AB funded events are strongly encouraged to apply.

Section 6 | Key Reminders and Frequently Asked Questions

AB funds may only be spent on programs for an organization that has been approved by the Student Activities Office. Funds can be used for expenses that are not deemed illegible by AB and adhere(s) to AB limits and guidelines.

All payments must be finalized before event. AB reserves the right to freeze the remaining allocated amount unless notified by a member of the organization.

The student group must submit a cancellation form for any funds that have been allocated by AB for cancelled events. This allows Allocations Board to reallocate these funds to other student groups on campus.

AB reserves the right to audit all accounts of groups awarded funding. Auditing will occur under the supervision of Student Activities Business Office staff.

The Package Handbook options are covered through a pool of funds taken directly from AB's budget. That is why there is no need to request AB funding for standard Facilities set-ups (including all building open/closing fees), BUPD, or SPS.

AB does not fund custom facilities set-ups for events, as the Package Handbook provides a wide range of options that should satisfy most event types.

Frequently Asked Questions

Where do we find prices?

The Student Activities Office, located at 1 University Road, has current rates for on-campus services. Student Activities Office also has extensive listings and contact information for Boston-area vendors. See approved listings in Vendor Book on OrgSync.

Do we pay taxes on our expenses?

No. Goods and services that are purchased by groups, whether through the group account or AB funds, fall under Boston University's tax-exempt status.

Can our organization put on an event with another AB funded organization?

Yes. Collaboration between groups is encouraged! This allows for bigger events that further enrich campus life. If you hold a collaborative event, denote it in the "Additional Comments" section of the

request and note which groups are involved. If a Bay State organization is collaborating with either a Beacon or Commonwealth organization and wants to request AB funding, the Beacon/Commonwealth organization must fill out the request. Thus, all payments using AB funds must be done through that organization.

Will AB make exceptions to its policies stated in this Handbook?

The Board's guidelines are generally strictly adhered to, but may be reconsidered if a group presents an extraordinary situation.

Where might our organization find additional resources and funding for our activities?

1. Other University departments and administrators
2. College student governments and residence hall associations
3. Ticket Sales
4. Alumni Network
5. Crowdfunding Platform
6. Corporate Sponsorship
7. Member Dues

How can I contact the Allocations Board if I have questions related to funding?

E-mail the Allocations Board at allocate@bu.edu; call the office at (617) 353-7561; or visit us during our members' office hours throughout the school year (office hours posted in the Student Activities Office and on OrgSync).