The Budget Allocation Committee (BAC) is responsible for the distribution of funds to SGA recognized organizations using money collected from the Student Activities Fee. The BAC procedure book should be used as a guide for the student organizations as they apply for funding for their events.

All SGA recognized student organizations and SGA approved task forces have access to this money through the BAC. The BAC consists of a seven-member panel under the chairmanship of the SGA Treasurer. All SGA organizations must come before the Committee to receive funding no fewer than two weeks prior to the scheduled event for which the organization seeks funding. The last day an organization is able to host an event, in any given semester, is the last day of classes.

Steps to secure a meeting with the BAC

1) Before submitting the proposal, the student organization must contact their Center for Leadership and Student Involvement (CLSI) advisor about the relevant details regarding the event.

2) After the meeting, a BAC proposal must be submitted online.
   1) The direct link to the online form can be found under: http://offices.colgate.edu/CLSI/Budget_Form.ASP
   2) For an example of a duly filled in BAC proposal form, see Appendix A.

   Please note that the form MUST be submitted ONLINE (and not to the CLSI Advisor or the Treasurer’s e-mail) by 2PM ON FRIDAY before the Sunday you intend to meet with the BAC. You are encouraged to submit an Excel Spreadsheet demonstrating the proposal budget breakdown. No late proposals will be accepted or reviewed on that Sunday.

3) Sign up for a time to meet with the BAC: The BAC posts a signup sheet in the CLSI office (adjacent to the COOP Fireplace) starting Monday at 2PM. The BAC meets with groups from 3PM to 5:30PM on Sunday and there are 10 time slots of 15 minutes each for groups to present their proposal to the BAC. Organizations are expected to sign up by 2PM on Friday before the Sunday meeting. The signup sheet will be removed promptly at 2PM. If the group fails to sign up for a time before the deadline, the proposal will not be considered for the Sunday meeting. Also note that organizations should not wait until the last moment to sign up for time slots as slots are limited and will be filled on a first-come, first-served basis. Organizations are encouraged to present their proposals to the BAC well in advance of a proposed event.

4) Have your CLSI Advisor sign the signup sheet indicating that they are aware of and approve of your proposed event.

5) The BAC holds its meetings on Sundays at 535 Herbst Seminar Room, 5th floor, CASE-GEYER Library.

Failure to comply with ANY of the AFOREMENTIONED steps will make the student organization ineligible to meet with the BAC. NO EXCEPTIONS WILL BE MADE.
Things to know prior to preparing a proposal…

Charity
The BAC will not allocate any funds directly to a charity.

Event Entry Fees
No entry fee should be charged for any event that would prohibit entrance to a BAC funded event.

Subsidized Costs
Any cost subsidized by the BAC may not be passed along to the participants. (e.g. If BAC funds food at a carnival, an entry fee to that event could not be charged and the food will be free. However, if a dunk tank is subsidized externally, a charge could be levied for its use. Donations may be suggested for any component of the event.)

T-Shirts
Typically, the BAC will not fund for T-shirts especially if they are meant for advertising. The BAC believes that there are more cost effective ways of advertising. However, some exceptions may be made if the T-shirts are integral to the operations of the event.

Advertising
Typically, the BAC will allot up to $75 for advertising. Certain exceptions will be considered based on the scale and specific needs of the event. Please note that the BAC will not fund for events that have already occurred or are advertised as occurring.

Alcohol
The BAC will not fund for alcohol for any event. However, it can fund for a caterer and a bartender.

Off Campus Activities
The BAC will consider the following when reviewing off campus activity proposals:

- Distance being travelled
- Method of transportation
- Number of participants
- Destination costs
- Benefit to the Colgate community

SGA Organization Collaboration
The BAC looks favorably upon SGA organizations taking the initiative to collaborate on an event, program, or project. This requires that all of the involved organizations play a role in the various planning stages. When SGA organizations collaborate, a representative from each involved organization is strongly encouraged to attend the scheduled BAC meeting. Additionally, one organization must be selected for the use of its budget code.

Missing a BAC Meeting
If a student organization does not attend its scheduled meeting, the BAC will not hear the proposal for the following two weeks, regardless of the consequences to the respective organization. It is the responsibility of the organization to contact the SGA Treasurer at least 24 hours prior to the meeting.

*Weekly BAC meetings may be canceled due to holidays, breaks, the inability to make quorum, and/or if all funds for the semester and/or year have been allocated.*
After the Meeting

SGA organizations will be notified of the BAC’s decision within 48 hours after their scheduled meeting time. BAC decisions will be sent directly to the organization via e-mail. If the student organization receives funding, the money will be transferred into the organization’s account within the week. If there is more than one organization sponsoring an event, program, or project, only one organization will receive the money – for accounting purposes.

Following are the various methods through which items or services can be purchased using money allocated from BAC:

1) Reimbursement: You may be reimbursed for approved items purchased for a BAC funded event. You must return all receipts to your CLSI advisor and then take a form to the cashier’s window. Tax is not reimbursed for money fronted by a student or department.

2) Online purchasing in CLSI: Online purchases can be made with a CLSI advisor in the CLSI office. Please contact your advisor to set up an appointment.

3) Vouchers: Once BAC funds are allocated, vouchers can be obtained from your CLSI advisor and used at local Hamilton businesses. Vouchers are used like gift certificates, and pink slip + receipt must be returned to your CLSI advisor.

4) Invoice: Caterers, performers, service providers etc. can send an invoice or bill to you or your CLSI advisor listing the exact cost of the service, date, time, location, and address in order to process payment. Payments will be mailed directly to the provider.

5) Cash Advances: Your CLSI advisor needs to fill out the proper paperwork to receive a cash advance. You can receive up to $350.00 at the cashier window. Anything over $350.00 requires separate paperwork that needs to be turned in to the controller’s office five days in advance. You can have a check made out for the amount or it can be provided as a direct deposit.

If the proposal is not funded by the BAC, the group can choose to appeal by resubmitting an altered proposal based on suggestions provided by the BAC. Before appealing a decision, the group must consult their CLSI advisor. If the proposal is rejected again, the group may appeal to the Student Organization Committee (SOC). Again, consulting the group’s CLSI Advisor is essential before appealing to the SOC.

After the event

Immediately following your event, please fill out the following survey:
http://www.surveymonkey.com/s.aspx?sm=s_2bf8gA2zeUtde7XoUVD_2b_2bA_3d_3d

If the survey is not filled out, the group will get sanctioned for eight weeks in the following semester where it will be ineligible to apply for BAC funding.
## Appendix A

### Example 1:

<table>
<thead>
<tr>
<th><strong>Budget Allocation Committee Request Form</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Information</strong></td>
</tr>
<tr>
<td>Date Submitted</td>
</tr>
<tr>
<td><em>Sponsoring Organization(s):</em></td>
</tr>
<tr>
<td><em>Event/Purchase:</em></td>
</tr>
<tr>
<td><em>Total Amount Requested:</em></td>
</tr>
<tr>
<td><strong>Contact Info</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Organization to receive funding:</strong></td>
</tr>
<tr>
<td><strong>Event Information</strong></td>
</tr>
<tr>
<td><em>Event Date &amp; Time</em></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Location:</td>
</tr>
<tr>
<td>Expected Attendance:</td>
</tr>
<tr>
<td><strong>Co-Sponsorship list (If applicable)</strong></td>
</tr>
<tr>
<td>Co-Sponsors</td>
</tr>
</tbody>
</table>
1. What is the reason your organization is requesting funding?

The Religious Club is requesting funding for the XYZ Banquet. We plan to hold the banquet at The Hall of Presidents on April 23, 2011. The celebration of will involve a dinner and a presentation on interfaith. This is an annual event and is enthusiastically attended by a diverse Colgate population.

2. What is your group’s mission statement, and how will receiving funding further its goals?

The mission of Religion Club is to better educate interested community about the practices and beliefs of the X tradition. Celebrating XYZ on campus with Colgate students will give those who do not have previous knowledge or experience with the X tradition a chance to gain a better understanding of the practices and beliefs of X at a cultural level. The celebration of this important (and fun!) holiday will also allow the X students on campus to practice one of their most important festivals in a friendly environment.

3. How will receiving funding contribute to campus life and benefit the Colgate and Hamilton communities?

Receiving funding for the banquet will allow for a significant event on campus and will help to further expose both the Colgate students and the Hamilton community members to the X tradition in a friendly and festive setting. We hope to generate greater interest about our culture and tradition in the community. XYZ, celebrated last semester was extremely successful and drew a crowd of more than 250 people and thus we know that there is much enthusiasm for X festivals at Colgate.
4. If you receive funds for an event or program, please describe your plans for publicizing to the Colgate and Hamilton communities.

The publicizing of this event will include posters, facebook invites, and personalized e-mail invites, which has worked very well for us in the past. We encourage students from the other religious communities on campus and the students in classes that relate to X tradition to attend the event.

5. As an organization, how will you evaluate the success and/or failure in regards to the use of these funds?

The evaluation of the success of the banquet will be made on the basis of the following factors: the number of attendees, the level of participation during the event, the responses of those who attend the event and the amount of food and supplies leftover after the event. The evaluation of the success of the event will help to improve the event when it will be held again next year.

6. What steps will you take to ensure this program is fiscally responsible?

To ensure that the program is fiscally responsible, money spent will be limited only to the items that are needed for the event, and we will try to use less than the allocated amount. We will work with Café Colgate, a restaurant we have been ordering food from for a long time and have built good relationship with, and try to get the best deals for a good assortment of food. We will look for the best sources to buy the colors from to minimize costs.

7. How has your CLSI Advisor assisted your organization in this process?

Our CLSI Advisor has been of constant help to us as we planned this event. We have gone through the logistics of event with her. She was very helpful with the selection of location for the event and with referring us to various resources on-campus as we work on the event.

8. In addition to the above questions, please attach a detailed
breakdown of your requested funding – the more specific, the better (if you have received a quote sheet from a vendor, please include this).

Food - from Colgate Cafe, Clinton: pizzas, pasta, lamb mint pie, fish and chips $1200 cutlery(plates, glasses, spoons, forks etc) - $2250 Drinks - $50 Buildings and Grounds Order $250 Advertisement (Posters)$75 Decorations - $100 Drinks - $50 Total - $3275

Questions can be addressed to Treasurer, Mike LoFaso mlofaso@students.colgate.edu or the Liaison Benae Beamon beamon@students.colgate.edu or your CLSI advisor.

Example 2:

**Budget Allocation Committee Request Form**

**General Information**

<table>
<thead>
<tr>
<th>Date Submitted</th>
<th>2/18/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Sponsoring Organization(s):</td>
<td>XYZ, ABC, PQR, JNU</td>
</tr>
<tr>
<td>*Event/Purchase:</td>
<td>PINK CONCERT</td>
</tr>
<tr>
<td>*Total Amount Requested:</td>
<td>$7,992.64</td>
</tr>
<tr>
<td>* Contact Info</td>
<td>* Name: Ben Bernanke</td>
</tr>
<tr>
<td></td>
<td>* Phone: 315 XXX YYYY</td>
</tr>
<tr>
<td></td>
<td>* Email: <a href="mailto:bbernanke@students.colgate.edu">bbernanke@students.colgate.edu</a></td>
</tr>
<tr>
<td>*Organization to receive funding:</td>
<td>XYZ</td>
</tr>
<tr>
<td>Event Information</td>
<td></td>
</tr>
<tr>
<td>-------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Event Date &amp; Time</strong></td>
<td>Date from</td>
</tr>
<tr>
<td>4/16/2011</td>
<td>4/16/2011</td>
</tr>
<tr>
<td><strong>Location:</strong></td>
<td>49 Broad Street</td>
</tr>
<tr>
<td><strong>Expected Attendance:</strong></td>
<td>250</td>
</tr>
<tr>
<td><strong>Co-Sponsorship list (If applicable)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Co-Sponsors</strong></td>
<td>Source</td>
</tr>
<tr>
<td>FOX</td>
<td>$$1,500</td>
</tr>
<tr>
<td>CNN</td>
<td>$$500</td>
</tr>
<tr>
<td>BBC</td>
<td>$pending</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td>$$2,000</td>
</tr>
<tr>
<td><strong>Details</strong></td>
<td></td>
</tr>
<tr>
<td>1. What is the reason your organization is requesting funding?</td>
<td></td>
</tr>
</tbody>
</table>

1. XYZ, ABC, PQR are asking for $10,000 to bring up Krugman Kaul Krugman is a Brooklyn, USA based hip hop artist with heavy electro influences. Many have compared him to Kid Cudy. London released his debut mixtape JAM! in 2008. In 2009 he collaborated with Machine Drum for his second mixtape. He has already been featured on the website of Cole Haan, in Gentleman's Quarterly (GQ), and numerous other music blog sites and magazines. We believe that this event, which incorporates a wide ranging collaboration with the XYZ, ABC, PQR, will bring together many students from different segments of the Colgate community, answering the administrations call for inclusive, diverse, and marketable programming. Krugman will most likely be signed before the year is over, making him extremely expensive to bring to campus; therefore, the 16th of April is
an awesome time to expose Colgate students to an innovative hip-hop with a unique brand and positive messages.

2. What is your group’s mission statement, and how will receiving funding further its goals?

2. Brothers stands on the mission of multiculturalism through academic excellence, campus leadership, community service, and brotherhood. The XYZ serves as a place to foster pan-Asian culture, while the LMN seeks to promote X culture in the Colgate Community. The OPQ has unity among students of different cultural, special interest, socioeconomic status, and racial backgrounds as its mission. PQR seeks to foster community and philanthropy within the Colgate student body. This event will serve the missions of these houses and organizations with its aim of providing fun and unique programming during spring party weekend, which also seeks to further a noble cause. The musical talent of Krugman is very unique and will peak the interest of many students who will be as diverse as the individuals represented by the three constituencies requesting funding.

3. How will receiving funding contribute to campus life and benefit the Colgate and Hamilton communities?

3. As already stated, this event, by taking place from 8:15-9:45 pm, it will fill a very important void in the spring party weekend programming. Ergo, Krugman’s performance will enhance the overall level of fun had by students Spring party weekend. This event will offer a great alternative to students that day, especially those who have an interest in hip-hop music. This music will benefit the Colgate community further by introducing students to an up and coming artist such as Krugman. Colgate missed out on Drake in 2009, there’s no need to miss out on London in 2011. This will also be a free concert, not causing students who face certain economic challenges to rethink their attendance at an event that they would love to attend. To sum up the answer to the question of benefit to the Colgate and Hamilton Communities, this event provides a unique and valued concert atmosphere which students will treasure long after the music stops that evening. They will, most importantly, enjoy this event with fellow
students, whom under normal circumstances they would not interact with outside of the classroom and gain awareness of the problems of Haiti which have once again fallen off the radar of Colgate students.

4. If you receive funds for an event or program, please describe your plans for publicizing to the Colgate and Hamilton communities.

4. The key to this event's success is proactive and multi-faceted advertising and marketing. Krugman, while experiencing great increase in popularity, is far from being the Household name that he will very likely become. Therefore, ABC, XYZ, PQR will have to play to their strengths of having diverse membership. From both the Asia House and the 1934 House, six cultural organizations are represented. This diverse membership will play a key variable in advertising the event by way of word or mouth and social connections. Secondly, we will generate posters to have placed throughout the campus. Thirdly XYZ will utilize its facebook fan page and website to advertise the event to individuals who regularly attend XYZ’s events and parties. The component of social media can be extremely effective when utilized properly and strategically. The members of these two houses and the XYZ organization will even shoot advertisement videos to add hype to the event and increase interest in a very comedic and informative manner. These videos will be posted to the XYZ’s fan page and website in the days leading up to the event. Lastly, XYZ will have a Coop table at which we will advertise the event during the week leading up to SPW. We will also entice students with cheap chocolate to make $3 donations to the charity via gate card.

5. As an organization, how will you evaluate the success and/or failure in regards to the use of these funds?

5. Given that this event is a concert, the level of success or failure is directly measured upon the quality of the performance and the quantity of attendance. While we want students to come away from the event with a greater awareness of the issues in Haiti we understand that it will be spring party weekend and that many will not be in a state of mind which allows them to think critically about issues like
medical disparities in an impoverished nation. Success will however be measured in part by the donations raised at the coop table the week of SPW in the coop at our publicity table. While we cannot control the quality of the performance, we can make sure to stay on top of the logistics and scheduling of the programming, providing for happy artists and an even happier crowd. The quantity of the crowd is predicated upon our marketing and advertising scheme which we believe to be as innovative as Krugman’s music style.

6. What steps will you take to ensure this program is fiscally responsible?

We are taking every measure to make sure that our costs will be low. The over all cost of the concert will be between $10,000 and $12,000. We realize that everyone's budgets are tight so we are applying to every available funding source; The BAC, BSA, WRCU, and the First Year Experience. We have carefully calculated every dollar we will spend based upon inquiries we've made and estimates we've received from local vendors. We are currently negotiating the primary estimates in order to ensure that we do everything possible to get the best prices available. This is our first available opportunity to get funding since we've compiled all of the details for the proposal. BSA and the other organization we're trying to get funding from have much more drawn out application processes; we plan to go before BSA Thursday, February 17th. We are currently contacting the administrators for Late Gate and FYE to discuss their application processes. We are confident that Late Gate will support us financially because of their mission: to provide evening social options to students, which do not include alcohol. We are the only proposal for an alcohol free, non-Greek musical event during the week. We are also confident that FYE will fund us because we are providing a great musical performance in an environment free of alcohol sub and free of social association with Greek houses. Both of these organizations will also look favorable on the opportunity we are affording underclassmen to meet members of various students groups and learn about Broad street housing opportunities first hand by experiencing 94 Broad. Because of these measures we are taking to draw funding from a multiplicity of sources, we must fiscally responsible in order to show all of these groups that we’re
worthy of their money. By doing so, we are also not draining a single source but spreading our financial support around; this will allow the BAC to support a concert without having to pay a much larger cost to put it on. We are approaching non-conventional sources of funding in order to maximize the use of funds available to student groups.

7. How has your CLSI Advisor assisted your organization in this process?

X has provided us with guidance and support. She has helped us choose a time for the concert and coordinate with other organizations so we do not overlap our event.

8. In addition to the above questions, please attach a detailed breakdown of your requested funding – the more specific, the better (if you have received a quote sheet from a vendor, please include this).

$5,000 for Krugman London to do a 60 minute set. "The $4,000 would be a flat fee. He would pay for his own travel and hotel out of that." $467.64: Chestnut Security. 8 Security guards for 3 hours at $18/hr + tax. $3,000: Stage and Roof from Branchini Sound Inc. in Ithaca. $75: advertising fees, Colgate print shop $350: TULIP coverage $450 : B&G for set up and clean up $650 : Tent total: $9,992.64

Questions can be addressed to Treasurer, Mike LoFaso mlofaso@students.colgate.edu or the Liaison Benae Beamon beamon@students.colgate.edu or your CLSI advisor.
BYLAWS OF THE BUDGET ALLOCATIONS COMMITTEE

The object of the Budget Allocations Committee (BAC) shall be to distribute the Student Activities Fee funds to recognized Student Government Association (SGA) Organizations from the Fund Allocation Pool of the SGA.

ARTICLE III. PROCEDURE

Section 1: Yearly Budget Requests.

A. Groups that receive percent allocations must submit semester budgets for their expenditures (e.g. Maroon News, CUTV, WRCU, COVE, Class Councils, SGA Operating Account, SPW, Dancefest, SA Sound, and Student Travel Agency).
B. The Treasurer shall carefully keep and maintain a history of which groups have received yearly budgets and the amount (in dollars) they have received.
C. Towards the end of each academic year, the Treasurer shall call a special meeting whose purpose shall be to evaluate yearly budget requests.
   a. All groups requesting a yearly budget shall be required to submit an outline of their justifications for doing so, along with their anticipated needs and expenses.
   b. The BAC shall evaluate the request.
      i. If the BAC feels the request overestimates expenditures or that a yearly budget is unnecessary for a group, the BAC shall meet with the group in order to discuss their concerns.
      ii. The BAC shall use the procedures described in the remainder of Article III to approve or deny any portion of a request.

Section 2: Requests for Funding.

A. Requests for funding must be submitted prior to the weekly deadline established by the Treasurer at the beginning of each semester.
B. Upon receipt, the Treasurer shall verify that the groups submitting requests are SGA approved groups and that they are currently eligible to receive funds per SGA guidelines and requirements.
C. Upon verification, the Treasurer shall distribute copies of the requests to the BAC no later than twenty-four hours before the BAC meeting time.

Section 3: Guidelines for Funding.

In order to be funded, a request must fall within the following guidelines:

A. The submission must be from an SGA-recognized group. That group must have a constitution on file and be eligible for funding as stipulated by the SGA.
B. The BAC can never provide funds for:
   a. alcohol;
   b. events that have already occurred or been advertised as certainly occurring.
   c. events to take place within two weeks of the BAC meeting date;
   d. events specifically for a non-SGA-approved group regardless of its affiliation or relationship to an SGA-approved group (an SGA-approved group cannot provide an ‘umbrella’ for which individual non-SGA-approved organizations may seek funding);
   e. events neither open to nor benefiting, all Colgate students.
C. The BAC supports:
   a. events open to the Colgate student body;
b. projects and services designed to benefit the Colgate community. Trips and conferences for group members can be supported if they can be shown to later aid and/or affect the overall Colgate community;
c. necessary and essential supplies to aid groups in achieving either (a) or (b).

D. Other factors the BAC should take into account:
   a. That the request furthers the SGA organization’s mission as outlined in their constitution. The BAC is not convened to express likes or dislikes towards requests/events but rather to determine eligibility and practicality;
   b. The organization’s past programming and fiscal responsibility. Specifically, its ability to follow through on its recent events/projects as described in their proposals;
   c. The amount of funds an organization has been allocated recently and/or how many events an organization has sponsored or plans to sponsor in a given semester;
   d. The BAC should recognize contractual obligations. If an event requested is of a contractual nature the BAC should recognize the need to approve funds for contractual obligations (e.g. rider, required meals, lodging, travel expenses) along with the proposal if deemed appropriate;
   e. The advantages present in collaboration;
   f. To have a successful event, a reasonable allocation of funds should be given, if requested, in order to provide for advertising. To eliminate all advertising funds is to limit the success of the event.

E. The Treasurer shall be responsible for informing the Presidents (or Treasurers as appropriate) of SGA-approved organizations of the guidelines for funding (Article III, Section 3) at the start of each semester. The Treasurer shall also post the guidelines in proximity to the location of the BAC Funding Request Forms.
Appendix C

Policy on Donations

Donations to not-for-profit organizations

University funds (both restricted and unrestricted) including student association monies may not be used to make charitable contributions. Sanctioned [authorized] student groups however may raise monies for not for profit organizations with the University acting as a fiscal agent for the monies raised. The (U.S.) organization must be a registered 403B entity before any funds may be disbursed. Proof of their 403B status must be supplied to the Accounting Office. Foreign organizations must be approved by the Vice President for Administration before any fund raising is undertaken. Moneys raised for any not for profit organization are not tax deductible gifts.

Donations to individuals or for-profit entities

Donations to individuals or for profit entities are not permissible as any such payments would be considered taxable income to the recipient.

Bereavement

Departments may make donations of flowers for bereavements. Cash donations to organizations must be processed through Human Resources and are subject to their guidelines.