2019-2020 Mass Funding Information Session

Brought to you by: MSU Office of Student Engagement
Registered Student Organizations @ MSU

• 272 Registered Student Organizations
• 12,500 students involved in clubs
Student Organization Fee

• Every student pays $9.70/semester
• Distribute funds to registered student organizations for the purpose of supporting clubs and helping them meet their goals.
• Divided into pools:
  • Mass
  • Rolling
  • Matching
  • Club Sports
OSE & Funding Boards

• Student Organization Funding Board (SOFB)
  • Governing body and makes all funding decisions on Mass, Rolling and Matching.
  • Funding Board is comprised of 3 ASMSU Senators, 2 students-at-large and is chaired by Senate VP.

• Club Sports Funding Board
  • Governing body of Club Sports Funding pool.
  • Club Sports Council, tier representatives, at-large, ASMSU senator

• Office of Student Engagement (OSE)
  • Primary liaison for registered student organization funding.
  • Do not make any funding decisions.
  • Fiscal Manager
<table>
<thead>
<tr>
<th>2019-2020 ESTIMATED Club Funding</th>
<th>FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Available</strong></td>
<td>$267,000</td>
</tr>
<tr>
<td>Portion to Club Sports</td>
<td>$75,000</td>
</tr>
<tr>
<td>6% Admin Fees</td>
<td>$16,020</td>
</tr>
<tr>
<td>Student Accountant</td>
<td>$5,500</td>
</tr>
<tr>
<td>Club Conference</td>
<td>$3,500</td>
</tr>
<tr>
<td><strong>Total to Allocate</strong></td>
<td>$166,980</td>
</tr>
<tr>
<td>Mass Budget</td>
<td>$111,320</td>
</tr>
<tr>
<td>Rolling Budget</td>
<td>$55,660</td>
</tr>
<tr>
<td>Matching Budget (Rollover from 2018-2019)</td>
<td>TBD</td>
</tr>
<tr>
<td>Reserve Budget</td>
<td>Min. $3,500</td>
</tr>
</tbody>
</table>
2018-2019 Mass Funding Allocations

• $394,392 requested from 87 clubs
• $120,482 allocated to 54 clubs
• Average allocation=$2,231 per club
Mass Funding Eligibility

• Your student organization MUST be currently registered with OSE.
• Your request must total **OVER $1,000**.
• Application must include expenses that will only take place between **July 1st, 2019 and June 30th, 2020**.
• Attend a Mass Funding Information Session (you are here).
Mass Funding Process & Timeline

• Information Sessions: Between Feb. 26th-Mar. 13th
• Application Deadline: March 26th at 12pm
• Application Review: March 26th-April 22nd
• Notifications of Funding: Between April 22nd-April 26th
• Funding Orientation: September
IMPORTANT POLICY CHANGES EFFECTIVE FY20

• No longer need to have received funding in the past to request Mass
• Maximum of $5,000 for Mass Funding Applications
Examples of Permitted Uses

Note: This is NOT an exhaustive list of permitted uses.

• Seed monies for fundraising activities for the registered student organization.

• Travel (domestic only, excluding Canada) to conferences and competitions related to the registered student organization purposes.

• Registration fees for activities, events or conferences.

• Educational programs.

• Support for organizational operations such as publicity, supplies, and activities of the registered student organization.

• Movies/films to be shown publicly or to advance the purpose of the registered student organization.

• Speakers/lectures.

• Other activities consistent with the mission of the registered student organization.
Tax Compliance

• 1023-EZ fee of $275 to stay in compliance
• Can request ONCE
• Must meet with ASMSU Legal Services before requesting.
Prohibited Uses

1. Purchase of alcohol or tobacco.
2. Philanthropic donations, charitable contributions or gifts of any type.
4. Any organization that does not have open enrollment.
5. Any item or activity deemed excessive, not justified, and/or in conflict with the mission of the club.
6. Social functions that are not related to a program or educational event.
7. Payment to members of the organization for any purpose.
8. Funding Board will not accept funding application requests for programs/events/activities that have already occurred.
9. Items purchased before funding is approved.
10. Academic scholarships
11. Bank account fees (initial deposits, overdraft, monthly fees, etc.).
12. Monetary investment funds.
13. Firearms. NOTE: This excludes targets and firearm accessories.
14. Damage fees and cancellation fees under the control of the club.
Food Policy

• Cannot apply for over $100 on food at general club meetings for ENTIRE year.
  • This excludes events, fundraisers, etc.

• When travelling, only individual full meals and group items (such as items for whole group) are eligible for reimbursement.

• Individual snacks or small items are not eligible.
Advisor Signature

When you get to the Advisor signature section (last page), STOP!

1. Choose the "Save Answers & Resume Later" option at the bottom.

2. Email the link to yourself (will come from Formstack) and then email to your student organization advisor.

3. Your advisor will review the application and then **SUBMIT** the form. This is the **last step**.

4. A confirmation email will be sent to your club (it will be sent to the listed club President) after the form is submitted by your advisor. You will also be emailed a copy of your completed application.
Budgets

• Revenue
• Date-Specific
• General
• Overall vs. Requesting from Funding Board
Good vs. Bad Budgets

• Good=
  • Specific and detailed
  • Clearly researched
  • Realistic

• Bad=
  • Vague
  • Even numbers (i.e. put $200 for every item)
# Good Budget Example

## General Budget

Budget for general club expenses that are **not** date-specific (i.e. club banner, website host fees, annual dues, club give-aways, general club marketing, etc.)

<table>
<thead>
<tr>
<th>Item/Description</th>
<th>Cost Per Item</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vinyl Banner</td>
<td>68.00</td>
<td>1</td>
<td>68.00</td>
</tr>
<tr>
<td>National Association</td>
<td>285</td>
<td>1</td>
<td>285.00</td>
</tr>
<tr>
<td>Annual Dues</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candy for Tabling</td>
<td>8.99</td>
<td>2</td>
<td>17.98</td>
</tr>
<tr>
<td>Pizza for Club Meetings</td>
<td>7.99</td>
<td>6</td>
<td>47.94</td>
</tr>
<tr>
<td>Posters-11x17 color</td>
<td>1.50</td>
<td>56</td>
<td>84.00</td>
</tr>
</tbody>
</table>
### Request #1 Budget

<table>
<thead>
<tr>
<th>1.1 Item/Description</th>
<th>1.1 Cost Per Item</th>
<th>1.1 Quantity</th>
<th>1.1 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>128.99</td>
<td>2</td>
<td>257.98</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2.1 Item/Description</th>
<th>2.1 Cost Per Item</th>
<th>2.1 Quantity</th>
<th>2.1 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flights</td>
<td>535</td>
<td>4</td>
<td>2140.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3.1 Item/Description</th>
<th>3.1 Cost Per Item</th>
<th>3.1 Quantity</th>
<th>3.1 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference Registration Fee</td>
<td>185</td>
<td>4</td>
<td>740.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.1 Item/Description</th>
<th>4.1 Cost Per Item</th>
<th>4.1 Quantity</th>
<th>4.1 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airport Shuttle</td>
<td>22.50</td>
<td>4</td>
<td>90.00</td>
</tr>
</tbody>
</table>
# Request #2 Budget

<table>
<thead>
<tr>
<th>Item/Description</th>
<th>Cost Per Item</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lemonade</td>
<td>11.50</td>
<td>2</td>
<td>23.00</td>
</tr>
<tr>
<td>Coffee</td>
<td>13.25</td>
<td>1</td>
<td>13.25</td>
</tr>
<tr>
<td>Assorted Cookies</td>
<td>13.25</td>
<td>3</td>
<td>21.45</td>
</tr>
<tr>
<td>Procrastinator Projector</td>
<td>60.00</td>
<td>1</td>
<td>60.00</td>
</tr>
<tr>
<td>Wireless Microphone</td>
<td>15.00</td>
<td>1</td>
<td>15.00</td>
</tr>
<tr>
<td>Posters</td>
<td>1.50</td>
<td>56</td>
<td>84.00</td>
</tr>
<tr>
<td>Speaker Honorarium</td>
<td>250.00</td>
<td>1</td>
<td>250.00</td>
</tr>
</tbody>
</table>
Bad Example

Reminders when building your budgets:

- ALL expenses MUST be incurred between **the date your funding request is approved and June 17th, 2018.**
- Be SPECIFIC! Do your research and anticipate your costs. **The more detail the better!**
- Do not round off dollar amounts, we prefer exact amounts.

### General Budget

Budget for general club expenses that are **not** date-specific (i.e. club banner, website host fees, annual dues, club give-aways, general club marketing, etc.)

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<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>club give-aways (t-shirts/pins/stickers, etc.)</td>
<td>5.00</td>
<td>50</td>
<td>250.00</td>
</tr>
<tr>
<td>Catering for meetings</td>
<td>5.00</td>
<td>20</td>
<td>100.00</td>
</tr>
<tr>
<td>Social events (renting bowling lanes at SUB)</td>
<td>50</td>
<td>3</td>
<td>150.00</td>
</tr>
<tr>
<td></td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Helpful Documents

• Common Campus Expenses
• Enterprise Rates
• Student Catering Menu

• http://www.montana.edu/engagement/organizations/funding.html
Tips & Tricks

• Use “Save and Resume later” to save and collaborate.
• Do NOT hit refresh button in browser.
  • Capture in real-time
• The content of this application will be the only information the SOFB has to make an informed decision.
• Do not GUESS on the budgets-do your research!
• Be thorough. More information is better than too little.
• Be realistic about the amount you request!
• Plan ahead to allow your advisor to give feedback and sign by deadline.
• Don’t leave anything blank.
SOFB Guidelines for Assessing Applications

• Quality/Completeness of proposal
  • Is the application complete?
  • Did the group convey their need for funding clearly?
  • Was their budget accurate and complete?
  • Overall quality of application.

• Purpose of event/program/conference is consistent with the purpose of the RSO
  • Is the purpose of the funding need consistent with the RSO?
  • Comes up more often with social events.

• Value to campus community
  • How will funding this organization bring value to the campus community?
  • Education, entertainment, cultural awareness, etc.
  • If they are attending a conference, how will those members bring their knowledge back to campus?
Guidelines to Assess Applications, cont’d

• Value to student organization
  • How will this funding assist the student organization internally?
  • Will it provide more visibility?
  • Provide leadership opportunities for its members?
  • Education/professional development to its members?

• Economical use of funds
  • Does their budget appear economical?
  • For example, do they allot $500 towards printing/advertising for an event? Does that seem like an economical use of funds for the event/program they are proposing?

• Funding will help organization meets it goals
  • Will this help move their organization towards their goals?
What if we don’t get Mass Funding?

• Eligible to apply for Rolling Funding and Match Funding in the fall.
• Catapalooza special funding up to $100
• Fundraise!
• Sponsorships/Donations
• Meet with OSE individually to discuss
FAQ’s

• Can we ask for money for Catapalooza?
  • Yes, put in general budget!

• What if we don’t know the date of our event?
  • General timeframe is fine.

• What if we are unsure how many people will be attending (conference, competition, etc.)?
  • Make an educated guess. What is your goal?

• Will the funding board fund all or none of the budget?
  • Maybe. Typically, they allocate a portion of your total overall.
  • Example: You ask for $5,000, they allocate $2,500. Typically, you can spend the $2,500 on anything you proposed in the application. We allow you to prioritize your own budget after you are funded.
FAQ’s

• What if we have the same event multiple times over the year?
  • Use date-specific requests and use ONE to capture the entire series.

• How do we know the price of a plane ticket or price of gas for next year?
  • Make educated estimates. Search what it is right now.
  • Gas: Overestimate! $3.00-$3.25/gal is reasonable.

• We may have money leftover this year from our student organization funding, can we use it next year?
  • No. You have until June 15th, 2020 to spend your money.
FAQ’s

• If we receive Mass Funding, is that the only funding we can get?
  • You may apply for Matching Funding in the Fall, but NOT Rolling.
• What if our budget changes or an event is cancelled after we are approved?
  • Budget Amendment Form
• What if our event is during the summer before school begins?
  • Must be after July 1st.
  • OSE will work with you!
Information Sessions

- 2/26, 4-5pm, SUB Ballroom D
- 3/6, 5-6pm, SUB Ballroom B
- 3/13, 10-11am, SUB 233
Need Help? Questions?

• Contact:
  • Mandy St. Aubyn, OSE
  • amanda.staubyn@montana.edu
  • 994-3113
  • 222 SUB
  • www.montana.edu/engagement

Direct Application Link: https://montana-mxeon.formstack.com/forms/massfunding

Deadline:
March 26th@ 12pm (Noon)