

Allocations Board Annual Report

2017-2018 Academic Year



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(1) Executive Summary

The Allocations Board (AB) is an organization tasked with distributing a portion of the Community Service Fee (CSF) to on and off campus events organized by Boston University undergraduate student groups. The AB is composed of undergraduate students who are involved in a diverse array of academic disciplines and on-campus activities. Although AB is housed in the Student Activities Office (SAO) and overseen by the Dean of Students Office, AB has a separate set of policies that it follows in addition to that of SAO's. Allocations Board members attend weekly board meetings and hold at least one office hour per week(?) in the Student Activities Office. Being a board member is a volunteer position, and members receive no monetary compensation. Rather, board members have the pleasure of being able to network with student leaders and attend events made possible with AB funds.

The purpose of this report is to provide detailed and transparent information on the internal and external operational changes AB has adopted to improve functionality within the board. AB's primary goal is to make programming easier for student groups while maximizing the benefit obtained from the CSF. Over this past year, AB transitioned to SAO's new recognition program, The Square. With the implementation of the Square, SAO was able to reorganize how student groups are categorized and change which groups are eligible for AB funding. AB has also experienced significant changes since the introduction of the semesterly funding policy, the Special Initiative Program and new project-based requests and need-based funding policies, implemented last year. This year, AB continues to help students adjust to the new policies and programs and aims to evaluate the usage of funding relative to last year.

For the 2017-2018 academic year, AB had a total budget of \$504,140.00, which is a decrease of \$1,071.67 compared to the 2016-2017 academic year. Due to last year's high rollover funding from groups, the spring allocation was increased to account for unused funding. Numerous events in the spring were directly subsidized by the Dean to be funded fully, resulting in the total approved amount of \$616,855.28. This proved to be a success as a decreased amount of unused funding rolled over from student groups. The total amount of funds requested for the year stayed approximately the same, amounting to \$1,190,164.16. Throughout the course of the funding year (September 05, 2018-May 17, 2018), AB reviewed 535 individual event requests. Of the 535 event requests, AB funded 370, which is a significant increase from previous years. Over the course of this year, AB has seen students begin to adapt to the new policy changes and utilize Special Initiative as a resource for unforeseen circumstances and events.

(2.1) New Policy Adaptation

The Allocations Board continuously reexamines its policies to best fit the needs of student organizations. In the 2016-2017 academic year, The Square recognition program was introduced, alongside semester funding and Special Initiative program. With the new policy implementation, AB strives to utilize the CSF as effectively as possible while streamlining the process of acquiring funds for event planners. Student groups are quickly adapting to and utilizing the new system. Student organizations have also been utilizing Special Initiatives as a resource. This growing utilization is illustrated in the increase from \$8,464 to \$37,901.00 for amounts allocated for Special Initiative. In the future, AB hopes that students continue to utilize Special Initiative as a resource for funding unforeseen events. Student groups are encouraged to continue attending Special Initiative meetings to better explain their funding requests and aid in funding decisions and allocations for student groups. AB urges all student groups to reach out to their AB advisor or the e-board to attend Special Initiative meetings.

(2.2) Common Misconceptions

The AB would like to use this section to address common mistakes and misconceptions students have made in the previous year.:

1. Additional Funding

If student groups are not content with their AB funding decision, they should appeal directly to the Dean of Students. AB encourages student groups to meet with any AB board member if they are unsatisfied with their funding decision as AB members can clarify why the decision was made and help them create a better budget request for future semesters. Other resources for funding include BU Crowdfunding, student fundraising events, student governments, and more. AB hopes that student groups communicate with the Board about their concerns regarding funding decisions so that AB can work with them to get them the necessary funds for their events.

2. Need-based funding

AB will take into consideration a student group's account balance as well as past allocation decisions when reviewing funding requests. Due to AB's limited funds, AB gives priority to student groups who are most in need of AB funds. These student groups generally have smaller account balances. However, AB also considers how successful events have been in previous years, and how much funds AB has allocated groups in the past, this is important as AB strives to be consistent and fair while effectively utilizing the CSF to the greatest benefit of the BU undergraduate community.

3. Other common misconceptions

- a. Project-based budget requests will not be funded by the AB
 - b. Operation costs will not be funded by the AB
 - c. Travel request will not be funded by the AB
 - d. Splash promotional items will not be funded by the AB
 - e. Budget requests for food must be both cultural and educational
 - f. AB does not fund recurring events
 - g. AB does not fund Baystate group in addition to the \$100 allocated to the groups at the beginning of the semester
-

(3.1) Internal Operations

Policy changes from last year have significantly increased AB's efficiency by drastically reducing the amount of time needed for meetings. AB will continue to hold alternating Monday night Special Initiative meetings and operational meetings as AB now reviews all funding requests at a separate meeting at the end of each semester. AB hopes this new process of reviewing semester requests will allow AB members more time to interact with student groups and experience the events made possible by AB funds. AB strongly encourages student groups to attend the Special Initiative meetings if they have submitted a request. During these meetings, AB reviews the request and discusses whether the request qualifies for a Special Initiative. With student groups present during said meetings, questions regarding their requests can be easily clarified. This helps AB gain more insight into the event and its importance to the BU community. AB's meeting time has been reduced to only one hour, which is much shorter than in previous years yet still allows AB to serve as a resource to student groups.

(3.2) Increased Membership

AB further increased its cap on membership to sixteen undergraduate students, who will not be graduating at the end of the current semester. This assures that members returning each year will continue to follow the precedents set by earlier Boards and maintain consistency from year to year. This past year AB had three seniors who graduated in the spring, and therefore, the Board recruited new and younger board members. Members who go on a leave of absence or studying abroad will continue to be on the board but shall not count in the calculation of quorum at meetings, nor shall they vote on funding matters. Last year, AB was able to recruit six new members with a diverse array of interests, skills, and opinions. AB has rolling membership and any student interested in applying to AB is welcome to attend a Board member's office hours, reach out via email at allocate@bu.edu, or attend one of AB's weekly meetings to learn more.

(3.3) Member's Roles

AB has an executive board that consists of the Chair, Vice Chair, Director of Operations, Treasurer, and Secretary. Toward the end of each academic year, AB holds executive board elections. Nominations for executive board positions are made the week before elections. On the day of elections, the presiding Chair(?) motions to open elections. Elections for the executive board starts with the most senior position and continues in order of descending seniority: Chair, Vice Chair, Treasurer, Director of Operations, Secretary, and Director of Communications. Each nominee has the opportunity to make a brief presentation. Afterward, Board members can question each nominee. At the end of the question period, the nominee leaves the room, and Board members discuss the nominees and select a candidate for office by majority vote.

Each executive board position has a unique set of responsibilities. The Chair convenes weekly meetings, sets the agenda, and oversees all of AB's operations. The Vice-Chair assists the Chair with matters such as audits, budgeting and the day-to-day functions of AB. The next executive board position is the Director of Operations, and they manage relations with student organizations and the BU administration. The Treasurer monitors auditing and the budget by tracking how much was allocated during semesterly hearings and special initiative meetings as well as which student groups have used their allocated funds. Finally, the last executive board position is the Secretary and, as mentioned previously, the Secretary's main role is to take minutes during meetings.

All other AB members are considered general board members. General board members are expected to attend all meetings. Typically, members on AB will hold office hours throughout the semester. These hours will be updated at the beginning of the year and will be posted on the AB website. During office hours, members monitor the AB email and address any questions that clubs have. AB hopes to continue streamlining its internal operations so as to minimize the time commitment required of all members.

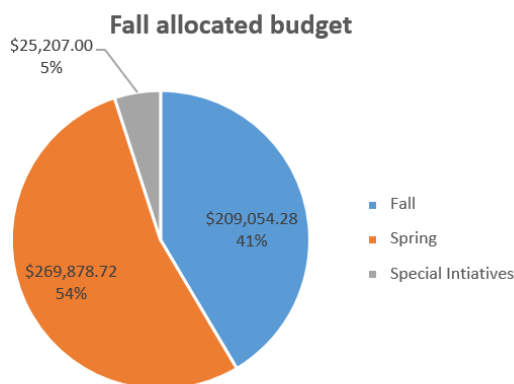
(3.4) AB Advisors

Each year AB assigns a portion of the Beacon and Commonwealth clubs registered with SAO to each member of the board, this AB member serves as the primary contact person for that club. Each board member is assigned a certain type of club that fits their individual strengths. For instance, one member is assigned all the fraternities on campus while another member is responsible for all the professional clubs. At the beginning of the semester, members send an

introductory email to their clubs to inform them that they will be their point of contact for any AB-related questions and concerns. Each member serves as an AB advisor to approximately 13-16 clubs, fielding any problems these clubs may have as well as sending reminder emails to these groups about spending their allocated funds or sending them any pertinent information such as AB funding deadlines. Through members assuming this role of “AB advisor,” AB hopes that student groups feel more connected to the Allocations Board and that this facilitates the process of addressing the needs of student groups, which is one of AB’s top priorities.

(4.1) Breakdown of Beginning of Year Budget

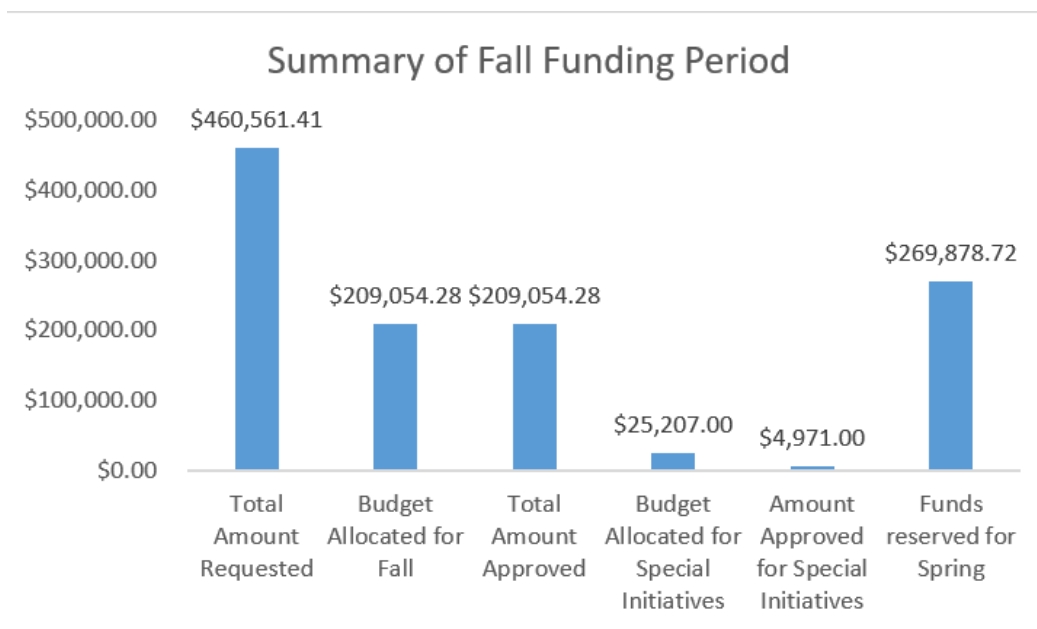
AB strives to allocate 40% of its budget for events during the fall semester and 60% of its budget during the spring semester. Adjusting to the amount spent for Special Initiatives last year, AB decided to allocate 5% of its budget to these requests for the fall semester, which equated to \$25,207.00. AB allocated \$209,054.28 to fall semester budget requests which is 41% of the original budget. However, after excluding Special Initiative funds from the original budget, AB allocated ~ 44% of the remaining funds to semester budget requests in the fall semester. The pie chart below outlines AB’s original budget of \$504,140.00 and the allocations to different categories at the beginning of the fall semester. However, since AB was able to roll back funds to the spring semester, the actual amount of funds allocated to the spring semester was dramatically greater, rising from a projected 54% at the beginning of the fall semester as shown in the pie chart to an actual allocation of 66% of the original budget.



(4.2) Fall Requests Breakdown

In the fall semester, AB received budget requests that totaled \$460,561.41. AB allocated \$209,054.28 of its total budget of \$504,140.00 during the fall semester. AB usually allocates

fewer funds in the fall so that there are enough remaining funds for the spring semester. AB decided to reserve \$269,878.72 for spring budget requests. Out of \$25,207.00 set aside for Special Initiative Requests, \$4,971.00 were allocated to fall Special Initiative Requests. While student utilization of the Special Initiatives Program for additional funding has increased, there was still a low amount approved for Special Initiatives due to the lack of budget requests.

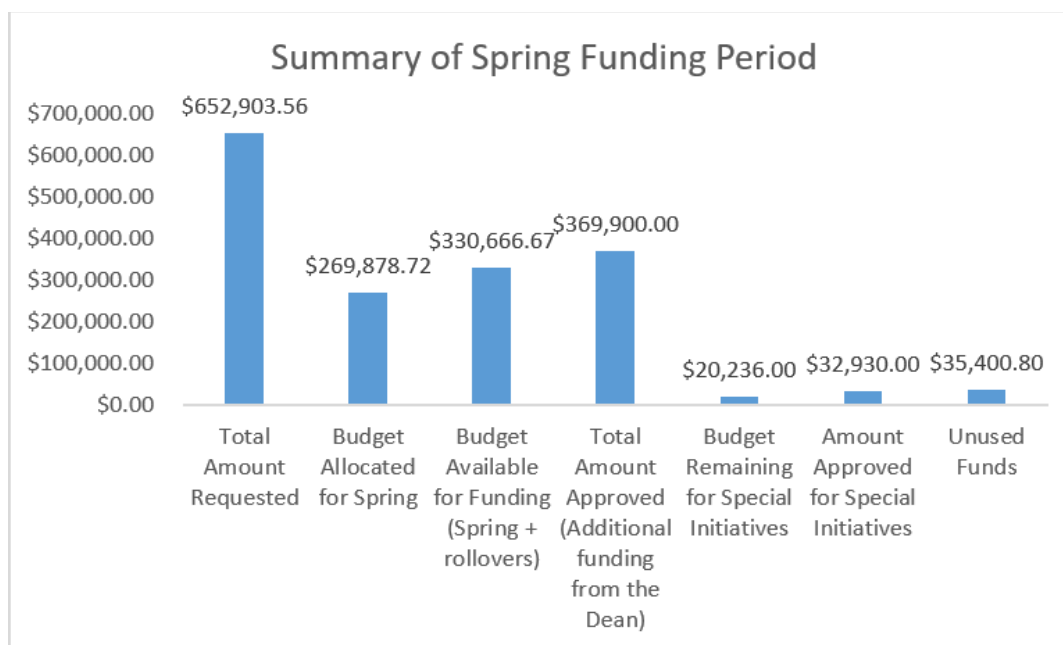


(4.3) Spring Requests Breakdown

During the fall semester, students groups used most of their approved funds (71%). AB rolled back the unused fall semester funds for the spring semester. From the original budget, AB had \$260,878.72 to be allocated in the spring semester. But after rolling back \$60,787.95 from the fall semester, AB had a total of \$330,666.67 for spring semester allocations. AB allocated \$369,900.00 which is 137.1% of the original budget to events in the spring semester from requests that totaled \$652,903.56. The additional funding originated from Dean Battaglino's decision to fund student events with the additional reserved budget. Numerous events for the spring semester were funded fully with the aim to increase overall student attendance. This was proven successful because of decreased unused funds. Students groups used 90% of their approved funds, meaning more events were successfully held.

In the spring semester, AB received Special Initiative requests that totaled \$70,109.19 which was significantly more than the \$20,236.00 left in the Special Initiatives funds for the Spring. Despite insufficient funds, \$32,930 was approved as the Dean of Students decided to fund additional

Special Initiative requests. Moving forward, AB would like student groups to continue to use the Special Initiative Program as a resource for additional funding.



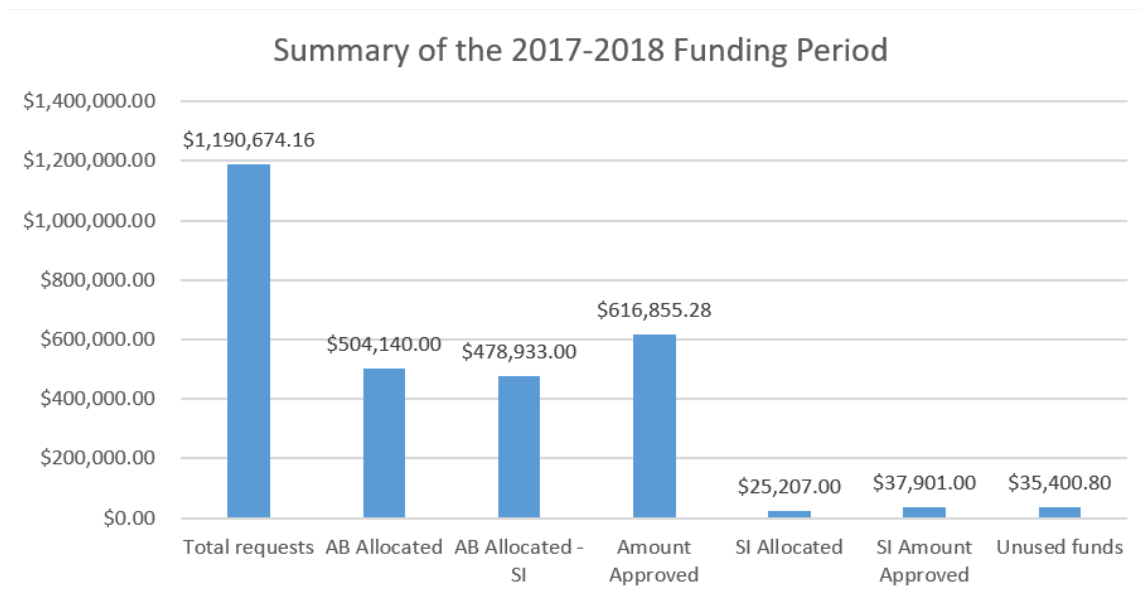
(4.4) Overview of Allocated Funds

Over the course of the academic year, AB received a total of \$1,190,674.16 in budget requests. At the beginning of the fall semester, AB had a total budget of \$504,140.00 for the fiscal year. After adjusting for AB's Special Initiative funds, AB had a total budget of \$478,933.00. However, due to AB's ability to roll back funds and additional funding from Dean Battaglino, the Allocations Board was able to allocate \$616,855.28 to semester budget requests. This corresponds to 52% of the yearly total requests, which is 7% higher than the previous year.

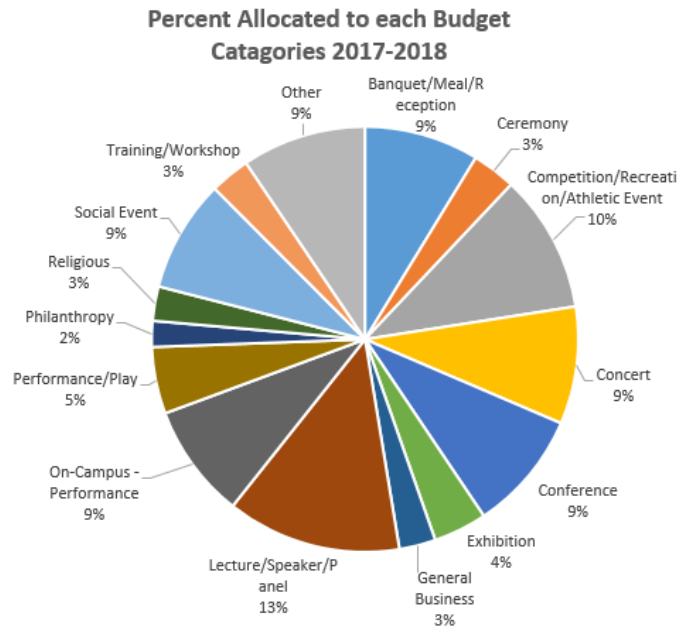
AB set aside \$25,207.00 for the Special Initiatives program this fiscal year but was able to allocate \$37,901.00. This is mainly due to requests that were directly approved by the Dean of Students. In the fall semester, AB allocated \$4,971.00 to Special Initiative requests while in the spring, AB allocated \$32,930.00 to Special Initiative requests. These figures are significantly higher than the previous year. This illustrates students increased utilization of the Special Initiatives Program as a resource for additional funding. In the coming years, AB hopes student groups will continue to capitalize on this new program.

At the end of the year, \$35,400.80 of the allocated funds in the spring semester were not used by student groups. Since all of the unused funds from the fall semester rolled over to the spring

semester budget, the unused funds at the end of the spring semester represent the total amount of funds that weren't used or allocated for the entire 2017-2018 academic year. This year there were no unallocated funds because the allocated funds for Special Initiatives were all used.

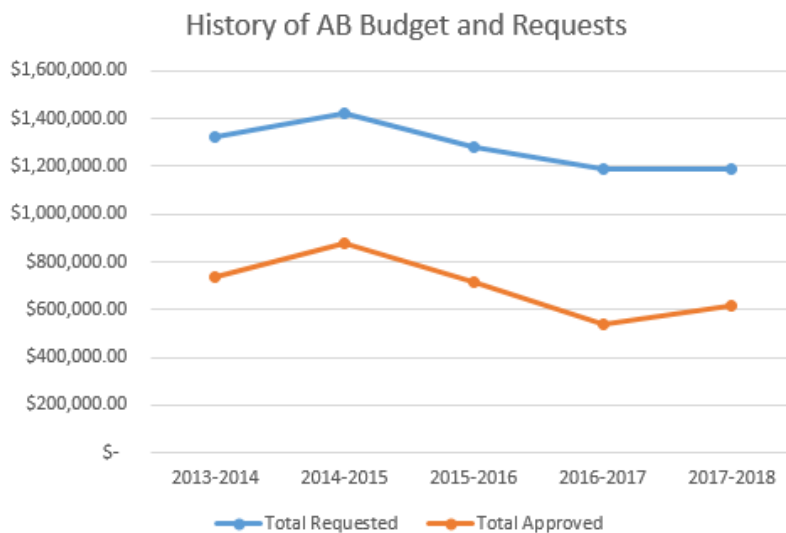


Of the \$616,855.28 AB allocated to student groups, the pie chart below breaks down how much funding various categories received. The chart below categorizes and illustrates the allocations of AB funds to various types of events during the 2017-2018 academic year. The highest quantity of funds was allocated to competitions/athletic events, on-campus performances, conferences, banquet meal events, and guest speakers. The other categories included filming events, fundraisers, meetings, promotional/informational tables and more. This represented 9% of the funds AB allocated this year. The distribution of events remained more or less consistent with the previous year.



(4.5) Trends

Every year, total requests for funds by student groups are much greater than AB's budget. In recent years, AB's budget has decreased, meaning the amount of funds allocated to student groups by AB has decreased proportionally. This past year AB received about the same amount of requests as per last year. Due to increased funds from the Dean of Students, AB was able to allocate more than last year, thus enabling student groups to have a higher event turnout. There were no unallocated funds this year.



(5) Town Halls

AB continued to hold Town Halls where student organizations can get help and give feedback on how well AB is addressing the needs of student groups. These meetings serve as workshops where student groups can ask questions and receive help with AB's funding process. This year AB held two such meetings, one in the fall and one in the spring, where several groups attended to both give feedback and receive help. The goal of these meetings is to encourage transparency and communication between the Allocations Board and student groups while increasing accessibility and visibility among student organizations. AB will continue to hold such meetings next year and will inform students of the upcoming dates.

(6) Challenges

AB has seen adaptation to the new policy changes from last year. This year AB experienced new challenges with communication and had trouble hearing back from students when emails were sent out. Due to the weakened communication, AB has had trouble in effectively sending out reminders of deadlines, upcoming training events, and Town Halls. Additionally, there was an internal policy change in regards to office hours which shifted the schedule. This caused a period of time in which AB had trouble communicating updates and audits to student groups. In the upcoming year, AB would like to improve its communication with student groups so that they are able to submit better requests and make the AB process a much more pleasant and rewarding experience for the student organization and the Allocations Board.

(6.1) Special Initiatives

AB has seen a large increase in the usage of the Special Initiatives Program this year. AB allocated \$25,207.00 for Special Initiatives in the fall but had requests that totaled \$77,209.19. However, this was mainly due to a couple of clubs that missed the semester funding deadline. With additional funding by the Dean's discretion, AB approved \$32,930.00 for Special Initiatives this year. In future years, AB will make adjustments to the budget if requests for Special Initiatives funding continue to largely surpass the allocated budget. Most importantly, student organizations are increasingly utilizing the Special Initiatives Program.

AB wants to remind student organizations that we understand if student groups find events such as competitions or conferences hard to plan a semester ahead. Please utilize the Special Initiatives Program for unforeseen events and AB will review the budget request accordingly. As much, AB hopes student organizations can fully spend the allocated funds for each event. This is important for student activities because AB has a limited budget for each semester. Underspent

expenses in the fall are rolled back to the spring semester and underspent expenses in the spring are not used in the fiscal year. AB wants to ensure all student organizations obtain the same opportunities for funding to maintain a diverse and active campus. 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.

(6.2) Transparency

AB will be trying to maintain a greater social media presence and upload relevant information on its website. This year AB added a Director of Communications position for a board member to increase AB's media presence. In the coming years, AB aims to use social media and our website as an avenue for clarification.

(7) Conclusion

AB hopes student groups feel comfortable and confident in seeking out financial support from AB as the Board's top priority is making student programming more financially feasible. This year the vast majority of students groups succeeded in spending the money that was delegated to them by the Allocations Board. Of the initial budget, less than 5% of the budget was left over which can be attributed to the difficulty in planning for the semester funding and canceled events. However, there was a drastic decrease from the previous year which had 11% of the budget left over. AB hopes that student groups continue to become acclimated to the new funding process and to better utilize the resources available.

Special initiatives funded weekly came out to \$37,901, including funding by the Dean's discretion. This expansion of the Special Initiatives program in the Spring Semester could be attributed to extensive board outreach to student groups via email and additional funding by the Dean. In the coming years, AB will continue to fully allocate the budget given at the beginning of the year (around \$500,000 each year). As well, we will continue the advisor system because it offered students an effective method of communication for the student groups.

AB believes these steps will help the Board maximize the funds given to student groups and minimize the number of denied requests. AB knows there is always room for improvement and relies strongly on student and administrative suggestions and feedback. If you have any suggestions, comments, feedback or questions regarding the Allocations Board, please contact AB at allocate@bu.edu.

Thank you for your continued support and best of luck programming in 2018-2019!

Sincerely,

Allocations Board
Boston University

Jae
Cho

Anmol
Dhaliwal

Amos
Peng

Matt
Cohen

Ethan
Barton

Chair

Vice Chair

Treasurer

**Director of
Operations**

Secretary