Section 5 | Budget and Allocations

Recent policy changes will appear in highlighted and italicized font.

QUICK TIPS

Who determines each club’s budget?

The Sport Club Allocations Board (SCAB).

What does my club need to do to get money?

- Fill out Budget Request Form and submit by given deadline.
- Give Budget Presentation to Sport Club Allocations Board.

When do I need to turn anything in or give my club’s presentation?

Budget Request Forms are due by 1:00 PM on Thursday, August 29th. Budget Hearings, where budget presentations are made to the SCAB, will be held on Thursday, August 29th and Tuesday, September 3rd between 5:00-10:00pm.

Where do I find the form?

Budget Request Forms can be found on Engage under the Documents section on the Sport Club home page.

Where do I turn in the paperwork?

Completed Budget Request Forms should be uploaded on Engage to the “Budget Request Form Upload” form under Forms on the Sport Club home page.

What does the SCAB take into consideration when making allocations?

The SCAB will take into consideration needs, use of previously allocated money, the previous year’s Sport Club Points Standings. For the 2019-2020 year, the old compliance system points will be considered.

What other accounts are there for managing club money (allocations, donations and expenses)?

None. All club revenue is required to be deposited to the club’s account through Recreational Services.

What other opportunities are there for requesting additional SCAB/University funding?

In March or April, unspent SCAB funds may be available for clubs who have qualified for regional or national competitions.
Budget & Allocations | Definitions

Sport Club Allocations Board (SCAB)

1. In the spring semester, elections will be held within the SCP to vote in five individuals to the Sport Club Allocations Board (SCAB). Two of the five will be the SCAB Chair and Vice Chair. There will also be a non-voting ex-officio member of the committee and a first alternate voted into position.

2. This committee will meet for budget hearings from 5:00-10:00pm on Thursday, August 29th and Tuesday, September 3rd. During this time, the SCAB will listen to every individual club that has submitted a budget request form give a budget request presentation. After hearing every budget request, this committee will meet on Wednesday, September 4th at 5:00pm to allocate money for every sport club based on the budget request hearings. The budget hearings and budget deliberations will be open to anyone who would like to attend.

3. This committee will also look at additional requests in the spring semester based on any additional available funding.

Requirements for the student members of the Sport Club Allocations Board (SCAB)

a. Student must be returning for the fall semester with plans to be enrolled in spring.
b. Student must be able to attend all budget hearings and deliberations.
c. Only one student per club can run for election and only one student per club can be on the board.
d. Maintain good standing with the SCP and the University as a club member throughout term.
e. The SCAB Chairperson and Vice-Chairperson will automatically be placed on the committee. Their elections will also take place at the April SCAC meeting. The same requirements will be in place for them as the other committee members.

Election

a. Held annually at the April SCAC meeting.
b. Five students will be elected to the committee, two of which will be the SCAC Chairperson and Vice Chairperson.
c. One non-voting ex-officio member will also be elected to the committee. The ex-officio member can speak, but not allowed to vote in the deliberations.
d. There will also be an alternate selected in case committee members leave the committee.
e. The ex-officio member would replace the first member who leaves. The first alternate would replace the second member who leaves.
f. In the event three or more original committee members leave the committee, an election for a replacement will be held at the next scheduled SCAC meeting.
g. The election will be by secret ballot. There will be a list of names provided to the voting representatives and they will check off those they want to vote for.
h. Each person who wants to run for a position will have the opportunity to make a brief speech to the SCAC, making a case for him or herself.
i. The elections for the SCAC Chair and Vice Chairperson will take place at the same April meeting and will occur separately from the rest of the committee’s election.
Sport Club Allocations Board Budget Requests

A club that wishes to be funded through SCAB must be a Recognized Student Organization (RSO) and must be accepted to, and active with, the SCP for an entire semester before any funds will be allocated. “Active” is defined as attending the SCAC meetings and following SCP policies and procedures. Budget hearings are held at the beginning of the fall semester.

Yearly Budget Request Forms are due at the beginning of the fall semester and serve to outline the expenses that a club anticipates for the year. An attached explanation may accompany the request form to show the specific breakdown of how the club is going to use the funds they are requesting (i.e. item, quantity, and cost).

Sport Club Allocations Board Budget Hearings & Deliberations

The Budget Hearings are held in the fall semester to determine budget allocations for each club. Clubs present their budget to the SCAB. The SCAB will hear each club’s budget presentation and then meet to deliberate on how much to fund each club for the entire year. The SCAB will determine how much to fund each club based on the previous year’s point standings, the effectiveness of each club’s presentation, the previous year’s performance, and by each club’s needs for the particular year.

The Sport Club Allocations Board also meets to review member organization requests for additional funding when such funds are made available through End-of-the-Year Reallocation.

SCAB Allocated Budget

Once the SCAB has finished the allocation process, each club awarded allocation money has the given amount to spend on club needs, pending recognition as an RSO and being in good status with the SCP. It is the responsibility of each club to keep track of that club’s expenditures throughout the year and keep an accurate balance of what funds are left in this account.

Deadline for Spending Allocated Budget

All clubs must spend or submit an expense request form by the Spring 2020 designated deadline. Unspent funds are swept into the general Sport Club Program account for reallocation. Clubs can submit a funding request to the Sport Club Allocations Board by the Spring 2020 designated deadline to receive funding from SCP sweepings.
Budget & Allocations | Sport Club Allocation Tier System

At the conclusion of each academic year each Sport Club is placed into a bracket based on finances, rosters, governing bodies, competition, and travel. In order to be placed into a bracket, the club must meet all requirements of that bracket. Each bracket has a maximum amount that can be allocated to each club within that bracket, with the Gold Bracket having the highest maximum and the White Bracket having the lowest. The Conditional bracket is for new clubs only. Actual allocation amounts will be determined by the Sport Club Allocations Board and the Sport Programs Staff. Conditional bracket clubs will not receive an allocation.

<table>
<thead>
<tr>
<th></th>
<th>GOLD</th>
<th>Black</th>
<th>White</th>
<th>Conditional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Expenses</td>
<td>&gt;$10,000</td>
<td>Between $3,000 and $10,000</td>
<td>&lt;$3,000</td>
<td>N/A</td>
</tr>
<tr>
<td>Roster Size</td>
<td>18*</td>
<td>15</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Competition Requirement</td>
<td>8 Contests</td>
<td>5 Contests</td>
<td>2 Contests</td>
<td>2 Contests</td>
</tr>
<tr>
<td>Travel</td>
<td>4 trips during the academic year including at least 1 out of state trip</td>
<td>3 trips during the academic year including at least 1 out of state trip</td>
<td>1 trip</td>
<td>1 trip</td>
</tr>
<tr>
<td>Fundraising</td>
<td>200%</td>
<td>200%</td>
<td>200%</td>
<td>$50/member per semester</td>
</tr>
</tbody>
</table>

**Annual Expenses:** This is the amount the club spent from July 1st - June 30th each year. Expenses can only be counted if they are spent through the club’s University account.

**Roster Size:** The largest club roster submitted during the academic year will be counted towards this requirement. All clubs must have at least 10 members, 80% of which must be students (does not include coach/instructor personnel).

**Competition Requirement:** Club contests are only counted towards tier requirements when a Post-Event Results Form is completed for that contest. A contest is considered the completion of a game/match against a non-University of Iowa team with at least four University of Iowa student members participating in the contest. There must be a winner and a loser of an event for it to be qualified as a contest. Each event will count as one contest with the exception of team sports. Each game played by a team will count as one club contest. For example, if a club participates in a team tournament and plays multiple games during that tournament, each game will be counted as one contest. If a team participates in a double-header against the same team, that will count as two contests. If a club competes as individuals at a tournament or event, all individual contests will count towards one team contest. If two teams from the same club are playing at the same event, only one team’s games will count towards the contest numbers. All clubs must compete in at least two contests a year.

**Travel:** A trip will be counted only if the proper Pre- and Post-Travel paperwork is submitted by stated deadlines. Should any of these forms be turned in late, the trip will not count towards the club’s travel requirement for the tier system. All clubs are required to take at least one trip per academic year. This trip must be outside of Johnson County.

**Fundraising** – All clubs must fundraise at least 200% of the annual allocation from Recreational Services. For example, if a club receives $100 from Recreational Services in Fall 2019, they will be required to fundraise $200 by June 30th, 2020. If a club receives $3,000 they will be required to fundraise $6,000. Fundraised monies can include dues, donations, and fundraisers. Fundraised money does not include any allocated money given to the club by Recreational Services, UISG, or GPSG.
How do I fill out the Budget Request Form properly?

A Budget Request Form can be obtained by visiting the Sport Club home page on Engage and looking under Documents. Download the form, complete it in its entirety, and upload the form to Engage by going to the Sport Clubs home page on Engage, clicking Forms and then Budget Request Form Upload. When filling out a Budget Request Form properly, particular fields must be completed before submission. One purpose of the form is to allow clubs to think critically about their club’s budget for the year to make sure they are being financially responsible and planning ahead. The second purpose of the form is to provide a snapshot of the club’s budget to the SCAB. Provided below are overviews of the different categories and why they are needed.

Club Name – Make sure to include your sport club’s name.
Date of Request – Put the date on which you are completing the form.
President’s Name – Put the Club President’s name.
Treasurer’s Name – Put the Club Treasurer’s name.

BUDGET CATEGORIES – For all categories, if you need to add additional lines, please do so by right clicking on the row number on the far left and clicking “Insert”.

Personnel Payment – Include a breakdown of how much you plan to pay to coaches/instructors and officials for any tournaments/matches/competitions that you will host this year.
Transportation – Sport Clubs are required to travel for competition. Include estimated costs that will be spent on paying for gas for trips, renting vehicles from fleet services, or for airfare to national competitions.
Hotel Rooms – Include estimated costs for hotel rooms for different trips the club plans to take for the year.
Equipment – Sport Clubs are always in need of equipment for their sport. Include an estimate of what equipment will be needed in the upcoming year and the associated costs.
Facility Rentals – If your club rents facilities for practices or to host games/matches, include the estimated number of costs for those rentals.
Affiliation Dues – If you are required to pay membership dues in a governing body or organization, include those costs here.
Workshops and Clinics – Your club may attend workshops and clinics throughout the year. Include estimated costs for those in this section.
Miscellaneous – If there are any costs that your club will incur that do not fall within these categories, include brief descriptions and costs here.
Total Projected Expenses – The formula in this cell should automatically total the amounts you have entered in all the categories above.
Income – Clubs are required to collect member dues and are encouraged to fundraise. Please include how much you estimate your club will receive in income from these two methods. Include each fundraising activity as a separate line.
Total Projected Income – The formula in this cell should automatically total the amounts you have entered in the income categories above.
Total Request for Allocated Funds – Include the amount your club would like to request from the SCAB. This amount cannot be more than your expenses minus your income.

How will your club utilize the allocated funds to enhance student success at the University of Iowa?

Recreational Services is part of the Division of Student Life, whose mission it is to enhance student success. Please explain how the funding requested by your club will support this mission.
Example of a Properly Completed Budget Request Form

**Sport Clubs Budget Request Form**

<table>
<thead>
<tr>
<th>Club Name:</th>
<th>Rock Climbing</th>
<th>Date of Request:</th>
<th>8/1/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>President's Name:</td>
<td>John Doe</td>
<td>Treasurer's Name:</td>
<td>Jane Doe</td>
</tr>
</tbody>
</table>

Provide a detailed description of your club's projected expenses for the 2018-19 academic year:

<table>
<thead>
<tr>
<th>Expense Category</th>
<th>Item Detail</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Payment</td>
<td>Coach/Instructor Fall Semester</td>
<td>$500.00</td>
</tr>
<tr>
<td></td>
<td>Coach/Instructor Spring Semester</td>
<td>$500.00</td>
</tr>
<tr>
<td>Transportation</td>
<td>Gas for Trip to Iowa State Competition</td>
<td>$100.00</td>
</tr>
<tr>
<td>(Gas, Vehicle Rentals, Flights)</td>
<td>Gas for Trip to Marshall Competition</td>
<td>$300.00</td>
</tr>
<tr>
<td></td>
<td>Gas for Trip to Duke Competition</td>
<td>$500.00</td>
</tr>
<tr>
<td>Hotel Rooms (Trips and Estimated Costs)</td>
<td>2 Hotel Rooms x 1 night in Ames</td>
<td>$200.00</td>
</tr>
<tr>
<td></td>
<td>2 Hotel Rooms x 2 Nights in Huntington</td>
<td>$400.00</td>
</tr>
<tr>
<td></td>
<td>2 Hotel Rooms x 2 Nights in Durham</td>
<td>$400.00</td>
</tr>
<tr>
<td>Equipment (Pieces of Equipment and Cost)</td>
<td>Helmets</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td>Chalk</td>
<td>$75.00</td>
</tr>
<tr>
<td>Facility Rentals (Fee of Reservations and Cost)</td>
<td>Rock Wall at CRWC x 2 nights/week - Fall Semester</td>
<td>$1,000.00</td>
</tr>
<tr>
<td></td>
<td>Rock Wall at CRWC x 2 nights/week - Spring Semester</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Affiliation Dues (Conferences, Regional/National)</td>
<td>National Rock Climbing Association Membership</td>
<td>$1,500.00</td>
</tr>
<tr>
<td>Workshops &amp; Clinics</td>
<td>N/A</td>
<td>$ -</td>
</tr>
<tr>
<td>Miscellaneous (Items Outside of Categories)</td>
<td>Awards for Hosting Rock Climbing Competition</td>
<td>$500.00</td>
</tr>
<tr>
<td></td>
<td>Registration Fees for Iowa State Competition</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td>Registration Fees for Marshall Competition</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td>Registration Fees for Duke Competition</td>
<td>$100.00</td>
</tr>
</tbody>
</table>

Total Projected Expenses: $7,375.00

Income (Dues Collection, Fundraising):

| Fall Semester Member Dues - 15 Members - $50/each | $750.00 |
| Spring Semester Member Dues - 15 Members - $50/each | $750.00 |
| Entry Fees from Rock Climbing Competition       | $1,000.00 |

Total Projected Income: $2,500.00

Total Request for Allocated Funds: $4,000.00
<table>
<thead>
<tr>
<th>How will your club utilize the allocated funds to enhance student success at the University of Iowa?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Through participation in the Rock Climbing Club, participants learn lifelong skills to be able to maintain healthy lifestyles. Staying active and being outdoors contributes to overall wellness throughout one's life. Additionally, participating in this club allows students to form special bonds with other club members, and to have an outlet to get away from studying and to relieve stress doing an enjoyable activity.</td>
</tr>
</tbody>
</table>
SCP End-of-the-Year Sweepings
Additionally, the Sport Club Program sweeps all unspent allocated budget funds each April and makes these funds available to active organizations for reallocation. Clubs can submit a funding request to the Sport Club Allocations Board during the month of April to receive funding from SCP sweepings. The due dates and request procedures are announced at prior SCAC meetings.

Depositing Funds into Sport Club Account
Deposits should be made in-person at the Field House Member Services counter. It is encouraged to submit deposits on the same day that they are received to prevent loss. Member Services will complete the deposit transaction and then hand you a receipt for your records.

Once you have a receipt, submit it to your club’s Assistant Director noting what the deposits were for, and the amounts. This will ensure accurate record keeping on your club’s account ledger, should questions arise later.

Dues
It is required that all Sport Clubs charge their members dues of at least $50 minimum per semester. Dues should cover the costs of running the club successfully including travel, equipment, operational costs, uniforms, etc. The dues amount should be reconsidered each year in development of the club’s financial plan. Every member in a club must pay the same amount in dues.

Dues can be paid through check, cash or U-Bill.

U-Bill Dues Payments
U-Bill dues payment can only be processed if eight or more members are interested in this payment method. We will not process U-Bill forms that do not also include the required excel spreadsheet.

Fundraisers
Fundraising by Sport Clubs is actively encouraged to add additional funds to the club account. All fundraised monies must be put into the Sport Club’s University account. Should a club need a W-9 or Tax ID number, this can be found online through a search for the University’s tax information which is public record. However, Sport Clubs do not fall under the University’s non-profit status which means fundraisers/donations are not tax-deductible.

Cash Box for Fundraisers/Events
Cash Boxes can be rented from the Student Organization Business Office (SOBO) for fundraising events where you will be collecting cash and/or making change. If you wish to rent a cash box, contact your Assistant Director.
How to Process U-Bill Payments

1. Print the U-Bill Dues form located under Documents on the Sport Club home page on Engage. A separate form is required for each club member who wishes to pay using this method.
2. Have each member complete the top half of the form and sign the form.
3. Have your club treasurer sign the bottom half of the form.
4. Once you have collected all the completed forms, the club treasurer needs to create an Excel spreadsheet listing the following information for each member who is paying via U-Bill:
   a. Member’s Name
   b. UI ID Number
   c. Dollar amount being billed
5. Submit all the physical copies of the U-Bill Dues Forms to your assigned Assistant Director and email the Excel spreadsheet to your assigned Assistant Director.

Example of a Properly Completed U-Bill Dues Form:

University of Iowa Sport Club UBill Dues Form

Club Name: Rock Climbing

Total Dollar Amount: $100

UBill Information

Full Name on Iowa One Card: Jane Doe

UI ID Number: 00075263 (include all leading zeros)

By signing this form I agree to pay membership dues in the amount of $100 to be charged to my University of Iowa UBill.

Printed Name: Jane Doe

Signature: Jane Doe Date: 9/9/18

Dues Collected by: John Smith Date: 9/9/18

This form will not be accepted if:

- The form is not entirely and completely filled out
- 30 or more days have passed since the participant has signed
- There are fewer than 8 members Ubilling their dues
- It is not accompanied with a completed excel spreadsheet including the following information:
  - Members Name
  - UI ID Number
  - Dollar Amount being billed
Budget & Allocations | How to Navigate the Budget Hearing / Deliberation Process

Budget Hearings

1. The budget hearings will be held from 5:00-10:00pm on August 29th and September 3rd, 2019.
2. All SCAB members are required to be present for hearings.
3. Clubs will sign up for 15-minute blocks of time at the submission of its budget request to the Sport Club Office.
4. Each club will provide a detailed budget request to the Sport Club Allocations Board prior to the budget hearing. This budget request will be due by 1:00pm on Thursday, August 29th. These requests will be compiled into a binder for the SCAB prior to the hearings.
5. Each club will have the 15-minute block of time to present their budget and answer any questions from the committee.
6. SCAB will hear every budget request prior to the Budget Deliberations.
7. Expected information to be provided would include; fundraising details, club dues, price quotes, and any other information that will aid the committee in allocating money fairly.
8. All budget hearings will be open to the rest of the SCP to attend, though conversation will only be allowed between the committee and the presenting club.
9. An Assistant Director of Sport Programs will sit in on all hearings and will be available to answer any questions about past or future budget expenditures or any other club-related business.

Budget Deliberations

1. Budget Deliberations will take place as soon as possible following the Budget Hearings.
2. They will be open to the rest of the SCP members to attend, though conversation will be limited to the committee and clubs that are asked a specific question.
3. SCAB Chair will lead committee through the process of allocating money to each club.
4. The committee will consider the point system and information provided in the budget packets and at the budget hearing in deciding how to allocate funds.
5. Each SCAB member will have one vote in deciding allocations. A minimum of three votes from committee members is needed in order to make any approvals.
6. The Assistant Director will sit in on the deliberations as an advisor to the SCAB, however, the Assistant Director will not possess a vote in the process.

Sport Club Program Sweepings Reallocation

Each April, active SCP organizations can request additional funding from the Sport Club Allocations Board from unspent funds from other SCP organizations. Clubs can submit a funding request to the Sport Club Allocations Board prior to the announced due date. The due dates and request procedures will be announced at prior SCAC meetings. The same process for fall allocations will be followed for SCP Sweepings Reallocation each April.