Student Appropriations Committee (SAC) Training for the Fall 2020 Grant Request Process
Hello!
We are the Student Appropriations Committee (SAC).
We're here to allocate student segregated fee funding through shared governance in accordance with state and federal policies and procedures.
What is SAC?

- Every semester, students pay segregated fees that fund different things on campus (the Union, Resource Centers, Green Fund, etc.) including SAC.
- This means that the SAC budget is dependent on a variety of factors, most notably how many students enroll and how much funding RSOs use from the prior semester.
- SAC is the committee, composed of Student Association representatives and RSO members, responsible for allocating funds to RSO's fairly & in accordance with policy.

SAC is the one place where students have a direct say in how their segregated fees are spent!
Where is SAC at?

- SAC has less money to allocate this semester – why?
  - Decreased enrollment
  - Smaller reserves
  - Increased demand
  - You spent most of your grant money last semester! Yay! Cool things are happening on campus!

- Because of this budget crunch, SAC is meeting to determine creative steps forward. Wanna be part of this? Join SAC!

- SAC will keep you in the loop via email, so keep a close eye on yours!
About SAC Funds

SAC is not and never has been intended to be the SOLE source of funding for student organizations.

● Your organization is not guaranteed to receive the full amount you request or even the amount voted on in the hearing.

● Your group, even if requesting SAC grants, should continue to pursue and maximize sponsorships and other fundraising opportunities.

● Your Student Involvement liaison and faculty/staff advisor can be great resources to help with securing additional funding.
SAC funds are state money.

This means that there are a lot of policies, rules, and procedures that the committee (& RSOs!) have to follow throughout the grant process.
Guiding policies

Federal
Viewpoint Neutrality as determined in Board of Regents, University of Wisconsin System v. Southworth shapes what information can and cannot be considered in financial decisionmaking.

State
UW System Administrative Policy 820 defines what student segregated fee funding can and cannot be used for within UW System campuses.

UWM
SAC Bylaws and precedence guide the committee on how to fairly allocate money and ensures a consistent process from semester to semester.
What does this mean for you?

It's really important to follow the policies laid out in this training and use proper websites and justification so we can make sure everything is in accordance at all levels!
Grants 101

Let's get this bread.
Our process is straightforward

1. **Attend Grant Training**
   
   Look at you, you overachiever. You’ve already crossed one thing off the list!

2. **Request Justifications**
   
   We’ll go over how to do this in a few minutes. You need verifiable, non-editable third-party justification for EVERYTHING.

3. **Submit Your Application**
   
   Use Presence to tell us about your grant. Ensure that all justification is attached and accessible, and be sure you actually click Submit!

4. **Go To Your Hearing**
   
   Plan to have at least 2 people from your RSO attend your hearing. This is important for the committee to ask your RSO questions.
**General Rules**

**Registration**
Your RSO must be registered through student involvement.

**Training**
At least one OFFICER of your RSO must attend grant training & sign in.

**# of Requests**
You can submit a request for each type of grant – event, travel, and operations – up to the cap for as many things as you’d like.

**Mission**
All requests must align with the mission of your RSO.

**Attendance**
Show up to your grant hearing. If you do not, you will be automatically denied. If something comes up, email sa-sac@uwm.edu 24 hours or more in advance.

**Disclaimer**
SAC Funding cannot be used for academic, personal, political, or commercial gain.
Types of Grants

RSO's can request one per type of grant each semester. There are four types of grants that RSO's can request from SAC...

- Event
- Operations
- Travel
- Kick Start
Event Grants

Overall Cap: $1500
- Marketing: $150
- Honorarium: $1500*
  - Housing: $125/day
  - Flight: $150 round trip
  - Ground transportation: $20/day, up to two days

Justifications to include...
- Quote from event services, including room set-up, A/V, etc.
- Quote from marketing for promotional materials
- Quote from honorarium with their rate listed, & a past quote with rate listed if over $1,000
- Screenshot of flight cost or car rental prices
- Screenshot of uw.foxworldtravel.com hotel rate for Wisconsin

Honorariums over $1,000 MUST include a past quote from the performer with their rate listed.
Operations Grants

Overall Cap: $1750
- Marketing: $150
- Office Supplies: $60

Justifications to include...
- Quote from marketing for general promotional materials
- Screenshot of an online shopping cart that includes all items you want to purchase up to $1750 (make sure all items are shown with individual prices!)

** Please do not upload singular items individually – this will significantly slow the process. Screenshots of shopping carts with ALL items are great. **
Travel Grants

Overall Cap: $1500
- Lodging: $125/night up to 3 nights for 2 rooms
- Ground Travel: $150 overall
- Flights: $150 round trip per person
- Registration: $75 per person

Justifications to include...
- Screenshot of registration cost
  - If the cost is not yet listed, you can use a screenshot of last year’s registration cost as justification
- Screenshot of flight cost (any flight website will work) or car rental prices (Enterprise)
  - Use fueleconomy.gov to calculate gas costs
- Screenshot of uw.foxworldtravel.com hotel rate for the city you are traveling to
  - DO NOT use the conference hotel – you MUST use this website!

***Be sure to use the sources for justification listed above or your grant will not be able to be funded!***
Kick Start Grants

For newly formed or recognized RSOs ONLY.

Overall Cap: $750*

- Caps from the relevant grant type still apply (for example, $150 for marketing)

Consider requesting for...

- Event: Small event to raise awareness on campus
- Operations: General marketing to assist with recruitment
- Travel: Funding for a local conference

These grants can be submitted after the deadline and are open until the last grant hearing date. Funds will be made available following the subsequent student senate meeting.

Please note that these grants are contingent upon SAC having enough members to vote. Without enough members, Kick Start grants cannot be allocated.
SAC cannot fund...

- Food
- Decorations
- Prizes
- Helium tanks
- Honorarium with a conflict of interest
- Gifts for UWM faculty or staff
- AirBnB
- Individual membership dues
- Improvement of spaces (ie. Furniture, cleaning products, appliances)
- Personal items (t-shirts, business cards, uniforms)

- Anything that has a free alternative on campus
- Off-campus facilities (unless the group has confirmed with Student Involvement that there are no adequate on-campus spaces for an event)
- Old quotes from performers, Event Services, Marketing, etc. The only exception is for Travel Grants, in which you can use last year’s conference price as registration justification
Filling out your grants
Step by Step.
Finding
The Form

1. Log into Panther Presence (uwm.presence.io).
2. Click on the upper righthand corner to sign in with your Panther ID.
3. Click on your "Person" icon and select "Admin Dashboard."
Once you are in your administrative dashboard, go to the menu on the left side of the screen and select "Manage" and then "Finance."
Filling it Out

- Click on your organization's NAME. Do NOT click on the little arrow next to it.
Filling it Out

- Scroll to the bottom and click on "Create a new one" to create a sub-budget.
Filling it Out

- Name the sub-budget the same title as your grant – a good rule of thumb is to include the SEMESTER it will be used, the TYPE of grant, and the NAME of your organization.
- Fill out all required sections to create a sub-budget – don't touch any of the non-required sections!
- Don't forget to Submit for Approval!
Filling it Out

- Go to the upper right corner, click “Create Transaction” and then select “Allocation.”
Filling it Out

- Fill out the form according to the prompts. Be sure to select the grant type you want!
- You'll need to fill out a different form for each grant type.
Filling it Out

- Justifications will be filled out at the END of the form. You will need an allocation request for EACH line item.
- Line items include things like Amazon CARTS (please don’t upload individual items one by one) or Lodging.
- You will need to upload non-editable, verifiable, third-party justification for each line item.
<table>
<thead>
<tr>
<th>Title</th>
<th>Memo</th>
</tr>
</thead>
</table>

### Budget

- **Title** – the category of item (ie. honorarium, marketing)
- **Memo** – Title of request (ie. Steve jobs speaking fee, marketing quote)
- **Budget** – Select your organization & the appropriate sub-budget
- **Amount** – the amount that you are requesting for THIS LINE ITEM
- **Allocation Attachment** – this is your non-editable, verifiable, third-party justification
- **Allocation Total** – will total up ALL line items in your request

*To ADD a line item, click the ADD button in the upper right.
For Example...

For more information and detailed instructions on justifications, please visit uwm.edu/studentassociation/SAC.

Title: Registration

Memo: Pond Conference Registration

Budget: Spring 2020 Travel Grant FROGS at UWM

Amount: $60

Allocation Attachment: PondReg.pdf

Allocation Total: $60
TO SUBMIT

● Scroll to the TOP RIGHT and click the green SUBMIT FOR APPROVAL button!
● Seriously. Don’t forget this step.
Sign up for
A Hearing

1. Use the link in the application to go to SignUpGenius.
2. Sign up for a slot for each grant you are applying for. If you apply for three grants, sign up for three slots.
3. After selecting your slots, click “submit and sign up” at the bottom of the page.
4. Add the time to your calendar and ensure that at least two people from your org plan to attend.
At your grant hearing

1. Each hearing takes about 5 minutes. Plan to arrive early.

2. At least one officer (we recommend two!) of your RSO will present the grant application to the committee. No powerpoints please!
   ○ You’ll do this on a tv screen in front of the committee.
   ○ Explain each grant and why it is relevant to your RSO’s mission.
   ○ The committee may ask you questions.

3. The committee will vote on a PRELIMINARY amount, and you are excused.

4. At the end of the semester, the committee will reevaluate the budget to determine final grant amounts and will make a cut across the board if necessary.

5. Your RSO will receive an email with the final approved grant amount.
After you get the grant

1. At the end of the semester, you will receive an email with the FINAL grant amount, which may include a cut.

2. You can begin spending this money the first day of the next semester. Set up a meeting with the Center for Student Involvement well in advance.
   - **Travel:** Meet at least 3 weeks prior to departure to make travel arrangements. The SI office will book all travel arrangements directly.
   - **Operations:** Mandatory contracts or vendors are required and proper state purchasing procedures must be followed. The SI office will place all orders and make all payments.
   - **Event:** Schedule a meeting with Student Involvement at least 6 weeks prior to the event date. Any person being paid for a service, performance, or to speak must be paid by a contract. Completed paperwork contract must be turned into SI at least 30 days prior to event.

**NO REIMBURSEMENTS WILL BE ACCEPTED. DO NOT PURCHASE ANYTHING YOURSELF. YOU MUST GO THROUGH THE CENTER FOR STUDENT INVOLVEMENT.**
A note on redistributions

1. Anything that is justified in the original grant can be purchased using that grant money. For example, if you have a hotel quote in a travel grant and decide you want to use the FULL travel grant for the hotel, you can do that without a redistribution.

2. You really only need a redistribution if...
   ○ You need to purchase something not justified in your original grant (for example, you asked for a meditation mat but now you need medicine balls instead)
   ○ There is a name change, such as deciding to go with a different speaker or to a different conference

3. If you need a redistribution, fill out the Presence form.
Automatic Denials

- Submitting your grant after the deadline
- Failing to attend grant training
- Failing to attend your grant hearing time without 24 hours of prior notice
- Incomplete organization registration with Student Involvement

Partial Denials

- Incomplete or insufficient documentation
  - All justification must be NON-EDITABLE, follow our published policies, and include all items needed for the grant
- Incomplete grant application
- Request for a non-fundable item
Justifications
Show us where your money is going.
Overall Guidelines

All justifications need...

- NUMBERS and amounts
- Itemized lists of what you are purchasing
- To be current (requested this semester)
- Unable to edit (PDF, screenshot, etc.)

Your key to success: non-editable verifiable third-party justification
Quotes: Marketing

To get a marketing quote...

- Fill out the form on Presence (will be posted on uwm.edu/studentassociation/sac)

DEADLINE FOR REQUESTS: March 11 at 4:30 PM
# Confirmation

**Client**

<table>
<thead>
<tr>
<th>Your name</th>
<th>Your phone number</th>
<th>Your email</th>
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</table>

**Reservation:** 144812

<table>
<thead>
<tr>
<th>Event Name:</th>
<th>Marketing Quote</th>
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**Status:** Quote

<table>
<thead>
<tr>
<th>Email Address:</th>
<th>Billing Reference:</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Event Coordinator:</th>
<th>Salesperson:</th>
</tr>
</thead>
</table>

| Gen Reserv Office | Gen Reserv Office |

### Bookings / Details

**Monday, October 15, 2018**

<table>
<thead>
<tr>
<th>Time Slot</th>
<th>Description</th>
<th>Quantity</th>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 AM - 12:00 PM</td>
<td>Marketing Quote (Quote 9/19/2018) 8x3 Banner E</td>
<td>Reserved: 7:00 AM - 7:00 PM</td>
<td>10</td>
<td>$60.00</td>
</tr>
<tr>
<td>Mark. Banner:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 x 3 Banner Paper</td>
<td></td>
<td>10</td>
<td>$60.00</td>
<td>$600.00</td>
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<tr>
<td>Less 75% Discount</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper Type:</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Re-hang Dates:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Save or Recycle:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7:00 AM - 12:00 AM</td>
<td>Marketing Quote (Quote 9/19/2018) L02 - Rec Center</td>
<td>Marketing for 1</td>
<td>3</td>
<td>$40.00</td>
</tr>
<tr>
<td>Mark. Posters:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gold Frame Poster</td>
<td></td>
<td>3</td>
<td>$40.00</td>
<td>$120.00</td>
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<tr>
<td>Less 75% Discount</td>
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<tr>
<td>Size 26” x 45”</td>
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<td></td>
<td></td>
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<tr>
<td>7:00 AM - 12:00 AM</td>
<td>Marketing Quote (Quote 9/19/2018) W- G03- Left Side Doors Terrace</td>
<td>Marketing for 1</td>
<td>6</td>
<td>$80.00</td>
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<td>Mark. Posters:</td>
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<tr>
<td>3’ x 4’ Seramark Movable Cling</td>
<td></td>
<td>6</td>
<td>$80.00</td>
<td>$480.00</td>
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<tr>
<td>Less 75% Discount</td>
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</tbody>
</table>

**Subtotal:** $300.00

**Grand Total:** $300.00
Quotes: University Printing Services

This is only relevant for JOURNALS. To get a marketing quote....

- Fill out the form on Presence (will be posted on uwm.edu/studentassociation/sac)

DEADLINE FOR REQUESTS: March 11 at 4:30 PM
Quotes: Event Services

To get an event services quote....

● Utilize the online request form on Presence

TIP: Submit early. Late requests will not allow for edits and may not be accepted.

**This is simply an estimate of cost, NOT a space reservation. Please fill out a space request form at the same time.**
Your name
Your phone number
Your email

Your event name
Quote
Gen Reserv Office
Gen Reserv Office

THIS IS AN ESTIMATE OF PRICING AND DOES NOT HOLD SPACE OR EQUIPMENT

Thursday, March 7, 2019
6:00 PM - 8:00 PM

<table>
<thead>
<tr>
<th>Description</th>
<th>Quantity</th>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wisconsin Room Lounge</td>
<td>1</td>
<td>$400.00</td>
<td>$400.00</td>
</tr>
<tr>
<td>Wisconsin Room West</td>
<td>1</td>
<td>$750.00</td>
<td>$750.00</td>
</tr>
<tr>
<td>Wisconsin Room AV System (WEST)</td>
<td>1</td>
<td>$340.00</td>
<td>$340.00</td>
</tr>
<tr>
<td>Microphone Handheld Wireless (Wisco West)</td>
<td>2</td>
<td>$65.00</td>
<td>$130.00</td>
</tr>
<tr>
<td>Parking Pass - Assigned (Flex Pass)</td>
<td>1</td>
<td>$12.00</td>
<td>$12.00</td>
</tr>
</tbody>
</table>

EVS AV Equipment:
- Wisconsin Room AV System (WEST)
- Screen 7 1/2 x 10'
- Short Throw Projector
- Wisconsin Room Audio System (WEST)
- Microphone Handheld Wireless (Wisco West)
- Parking Pass - Assigned (Flex Pass)

EVS Miscellaneous:
- Parking Pass - Assigned (Flex Pass)

Instructions:
1. If user received pass/code before arrival, scan code at Entrance Gate. Gate should open.
2. When leaving, scan code at Exit Gate. DO NOT use at paystation.

Subtotal | $413.00
Grand Total | $413.00
To get a hotel quote:

- Visit [https://uw.foxworldtravel.com/](https://uw.foxworldtravel.com/)
- Click "Lodging & Per Diem Calculator" in the top menu
- Fill out form according to your proposed travel dates
  - When you get to the final screen, do NOT include the M&IE allowance - SAC cannot fund food so it should not be included in your quote
- Verify & submit your information, then screenshot the final page

Include a screenshot in your grant submission. DO NOT include the M&IE allowance in your request. Please note that SAC can only fund the Wisconsin state rate.
# Lodging Maximums and M&IE Per Diem Allowance Calculation

<table>
<thead>
<tr>
<th>Date</th>
<th>Lodging Maximum</th>
<th>M&amp;IE Per Diem Allowance</th>
<th>Location</th>
<th>Provided Meals</th>
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</thead>
<tbody>
<tr>
<td>03/16/2019 (Sat)</td>
<td>$314.00</td>
<td>$57.00</td>
<td>District of Columbia, DC</td>
<td></td>
</tr>
<tr>
<td>03/17/2019 (Sun)</td>
<td>$314.00</td>
<td>$76.00</td>
<td>District of Columbia, DC</td>
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<td>03/18/2019 (Mon)</td>
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<td>$76.00</td>
<td>District of Columbia, DC</td>
<td></td>
</tr>
<tr>
<td>03/19/2019 (Tue)</td>
<td>$314.00</td>
<td>$76.00</td>
<td>District of Columbia, DC</td>
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<tr>
<td>03/20/2019 (Wed)</td>
<td>$314.00</td>
<td>$76.00</td>
<td>District of Columbia, DC</td>
<td></td>
</tr>
<tr>
<td>03/21/2019 (Thu)</td>
<td>$314.00</td>
<td>$57.00</td>
<td>District of Columbia, DC</td>
<td></td>
</tr>
</tbody>
</table>

**Location Lodging Maximum:** $1570.00

**Location M&IE Allowance:** $418.00

*Disclaimer: The UW TravelWise calculator is the official source of University travel rates to estimate lodging and M&IE Per Diem Allowance maximums prior to making trip arrangements. Maximums are updated monthly using the federal government’s rate file, amounts vary and are based on the entry of month/date/location of travel. Travelers are advised that reimbursement rates change on a monthly basis and the reimbursable maximum may vary slightly from the point of initial lookup. For reference purposes only, historical rates are maintained in accordance with the University's Accountable Plan requirements for timely filing of expense reports. Please contact your department travel coordinator or Institution’s travel manager with further lodging or M&IE Per Diem questions.*
Quotes: Flights

To get a flight quote....
- Go to flights.google.com or any other flight search website
- Fill out all details of when and where your flight will be to
- Include cost for the accurate number of people flying (for example, 4 people flying on $150 tickets should be requested at $600)

Include PDF or screenshot in grant submission.
Quotes: Ground Travel

To get a ground travel quote:
- Visit fueleconomy.gov/trip to determine your mileage cost
- Visit Enterprise or another car rental site to get a car rental estimate

Include PDF or screenshot in grant submission.
Trip Calculator

Trip Vehicles

Photo Not Available
1993 Jeep Cherokee 4WD
2.5 L, 4 cyl, Manual 5-spd, Regular
Comb. MPG: 18.0
Cost: $9.92

Add a Vehicle

Trip Plan

Add a Stop

Calculate the Trip

Directions and Map

Milwaukee, WI, USA
79.4 mi. About 1 hour 19 mins
1. Head south on N Milwaukee St toward E Wisconsin Ave 0.1 mi
2. Turn left at the 2nd cross street onto E Michigan St 0.1 mi
3. Turn right onto N Jackson St 433 ft
4. Take the I-794 W ramp to I-94 W 0.3 mi
5. Merge onto I-794 0.3 mi
6. Keep left to stay on I-794 0.7 mi
7. Continue onto I-94 W 69.8 mi
8. Keep left at the fork to continue on WI-30 W, follow signs for Madison 3.1 mi
Quotes: Honorariums

To get an honorarium quote:

○ Email the person you are hoping to have speak (or their agent)
○ Work closely with your liaison

Include PDF or screenshot of emails and quotes in grant submission.
VIP's name.

VIP's fee for this event would be $50K plus first class travel for two from Los Angeles.

Please let me know if you have any further questions whatsoever.

Very best wishes,

Tiffany

Tiffany Tomlin
Executive Director, Penguin Random House Speakers Bureau
1745 Broadway | New York, NY 10019 | (212) 572-2395 | ttomlin@penguinrandomhouse.com
Visit website: http://www.prhspeakers.com | @Facebook | @Twitter | @LinkedIn
Important Deadlines

- Grant allocation requests will open Friday, February 28th at 4:30 PM
- Marketing Quote Request due March 11th by 4:30 PM
- Event Services Quote Request due March 11th by 4:30 PM

**OVERALL GRANT DEADLINE IS FRIDAY, MARCH 13th at 4:30 PM**

*No late submissions accepted.*
Contact Information

- Student Appropriations Committee: sa-sac@uwm.edu
- Event Services: reservat@uwm.edu or 414-229-4828
- Union Marketing: markdesk@uwm.edu or 414-229-5538
- Student Involvement: csidesk@uwm.edu or 414-229-5780

**General questions? Email sa-sac@uwm.edu**
Next Steps

- Keep an eye on your email.
- Create those sub-budgets.
- Begin collecting quotes and justifications from Marketing & Event Services.
- Visit uwm.edu/studentassociation/sac regularly.

**General questions? Email sa-sac@uwm.edu**
Thanks!
Any questions?
Email us at sa-sac@uwm.edu!