



Project, Event and Conference Funding Procedure

Policy owner:	Vice-President, Operations and Finance
Audience:	URSU Members
Approved:	Board of Directors Meeting September 8, 2020
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1. Introduction

The Project, Event, Conference (PEC) Procedure is a set of guidelines to help future Board Members and students come to a better understanding of the project, event and conference budget line item and how the disbursement of funds shall take place. This procedure will also outline what information is required from anyone wishing to apply for PEC funding. This procedure is subject to the Project, Event, Conference Funding Policy.

2. Definitions

- *PEC* - Project, Event, and/or Conference.
- *Student Group* - an URSU-ratified club or student association
- *Individual Student* - any U of R student eligible for URSU PEC funding
- *Recipient* - a Student Group or Individual Student who is awarded PEC funding
- *Grant* - any funds under \$2,000 that are provided to a recipient
- *Contribution* - any funds over \$2,000 that are provided to a recipient
- *Agreement* - a contractual agreement between URSU and the recipient
- *Project* - a series of activities or events coordinated to reach a particular goal with specific start and end dates. (i.e. a campaign with multiple aspects over a number of days or weeks)
- *Event* - an activity with a particular goal. (i.e. a fundraiser, rally, or speaker)
- *Conference* - partaking in an educational initiative as part of a larger project or mandate. (i.e. attending a workshop or conference).
- *Funding Period* – a period that contains a portion of the PEC budget that has been allocated for disbursement.
- *URSU* - Students' Union of the University of Regina Inc.
- *Application Period* – a period when applicants may submit funding requests for funding from a particular Funding Period.

3. Application & Reporting Requirements

- a) Any group or individual wishing to apply for PEC funding must complete the appropriate application package.
- b) Applications for PEC Funding must be received at least one (1) month prior to the event, conference or project, unless the VP of Operations & Finance believes there is an exceptional circumstance.
- c) Only applications that are complete will be reviewed by URSU.
- d) Presentations to the Executive Committee and/or the Board of Directors to support an application will only take place upon request by the VP of Operations & Finance.
- e) Applications for PEC Grants (under \$2,000) will be reviewed and approved by the Executive Committee.
- f) Applications for PEC Contributions (over \$2,000) will be reviewed and approved by the Board of Directors.
- g) Presentations to the Executive Committee and/or the Board of Directors in support of an application will only take place upon request by the VP of Operations & Finance.
- h) All recipients must provide a detailed post PEC report to the VP of Operations & Finance according to the deadline listed in their agreement. Contribution recipients must provide a detailed financial report that includes an accurate list of revenues and expenses by the deadline listed in their agreement.
 - i) URSU reserves the right to request original receipts and/or invoices, proof of payment, and other financial documentation.
- i) Any recipient who does not provide a required post PEC report or financial report will not be eligible to apply for future funding.

4. Grants & Contributions

- a) Any grants must be approved by the Executive Committee.
- b) Any contributions must be approved by the Board of Directors.
- c) Any funds awarded to a recipient will only be received after an agreement has been signed.

5. Application Funding Periods

- 5.1. Applications will only be accepted and considered within the following funding periods;
- 1) Spring/Summer: PECs taking place between May 1st and September 30th.
 - (a) Applications must be received between May 1st to and the last board meeting in August.
 - 2) Fall: PECs taking place between October 1st and January 30th.
 - (a) Applications must be received between September 1st to and the last board meeting in December.
 - 3) Winter: PECs taking place between February 1st and April 30th.
 - (a) Applications must be received between - January 1st to the last board meeting in May.

Applicants must submit applications within one of the above Funding Periods.

5.2. If the portion of the budget allocated to any specific funding period is depleted, then no additional funding may be dispersed unless approved by the Board of Directors. In such cases the Board will review applications on a case-by-case basis and consider going over budget taking into consideration what is best for URSU and/or the applicant. If the budget for a particular funding period is not exhausted, then any remaining funds may be carried over into the next funding period.

6. Process

- a. Applicants must submit their application online through the CampusGroups platform.
- b. Application will be reviewed by the Vice President Operations and Finance (VPOF).
- c. VPOF shall assess the application using the applicable scoring matrix form.
- d. VPOF will :
 - i. present Grant applications along with their scoring assessment and recommendation at the next available Executive Committee meeting for approval
 - ii. present Contribution applications along with their scoring assessment and recommendation at the next available Board of Directors meeting.
- e. VPOF advises applicant as to the decision regarding their application.
- f. VPOF forwards confirmation of approval for to accounting for processing of payment
- g. Accounting issues payment and advises applicant how funds are to be received.

7. Consequences for Non-Compliance

Failure to follow these procedures along with the corresponding policy may result in the Vice President Finance and Operation rejecting an application for funding. Furthermore the Executive Committee and/or Board of Directors may not approve an application for funding and/or any other future requests from the same individual or organization.

8. Related information

- URSU Financial Policy: <http://ursu.ca/pub/documents/Financial+Policy+2016.pdf>

Appendix A: Sample Application Package - Individual Student

URSU Application Package - PEC Funding - Individual Student

Applicant Information:

Name of Applicant:

Student Number:

Phone:

Email:

Have you submitted a PEC Funding request to URSU in the current academic year?

- Yes
- No

PEC Information:

Name of PEC:

Description of PEC: *Include detailed information about what this PEC is.*

Date(s) of PEC:

Objectives of PEC: *What are the objectives of the PEC? If it's a conference, what are you hoping to accomplish while there? If it's a project or event, what are the goals?*

Results of PEC: *Once the PEC is finished, how will you know it was successful? How are you going to share your success with fellow students?*

Recognizing URSU: *How will you recognize URSU for our funds?*

Have you requested funds from other campus organizations? *Please select all that apply.*

- Faculty or Department (Please list: _____)
- Student Society (Please list: _____) *E.g. Education Students' Society*
- Student Club (Please list: _____)
- RPIRG (www.rpirg.org)
- Women's Centre
- UR Pride Centre (www.urpride.ca)

Budget:

Your budget should balance. (i.e. revenue matches your expenses)

REVENUES		
Source:	\$ Requested or Confirmed	Status?
Applicant's Resources	\$170.30	CONFIRMED

URSU	\$700	<input type="checkbox"/> Confirmed <input type="checkbox"/> Requested
<i>E.g. Women's Centre</i>	\$300	<input type="checkbox"/> Confirmed <input type="checkbox"/> Requested
		<input type="checkbox"/> Confirmed <input type="checkbox"/> Requested
Total Revenue:		

EXPENSES		
Source: (Include details / description)	Anticipated Cost	Quote Included
<i>E.g. Travel (Airline ticket [WestJet] round trip)</i>	\$650	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>E.g. Food & Per Diems (Rates per CRA limits \$90.10 X 3 days)</i>	\$270.30	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>E.g. Conference Fee (as listed on the conference website)</i>	\$250	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total Expenses:	\$1,170.30	

Signature:

Date:

Appendix B: Sample Application Package - Student Group

URSU Application Package - PEC Funding - Student Group

Student Group Information:

Name of Student Group:

Are you an URSU Ratified group?

Yes

No

Website:

Email:

Has this student group submitted a PEC Funding request to URSU in the current academic year?

Yes

No

of Members in Student Group:

Please include the names, roles and a contact e-mail address of each of your Executives:

Contact Information:

Name of Contact for Application:

Student Number:

Email:

Phone:

PEC Information:

Name of PEC:

Description of PEC: *Include detailed information about what this PEC is.*

Date(s) of PEC:

Objectives of PEC: *What are the objectives of the PEC?*

Results of PEC: *Once the PEC is finished, how will you know it was successful? How will students be impacted?*

Recognizing URSU: *How will you recognize URSU for our funds?*

Have you requested funds from other student organizations? *Please select all that apply.*

- Student Society (Please list: _____) *E.g. Education Students' Society, Social Work Students' Society*
- RPIRG (www.rpirg.org)
- Women's Centre
- UR Pride Centre (www.urpride.ca)

Have you requested funds from any University departments or agencies? *Please select all that apply.*

- Faculty or Department (Please list: _____)
- President's Office
- Student Affairs
- UR International
- Aboriginal Students' Centre
- Community Research Unit
- Other: (Please list _____)

Financial Information:

Balance Sheet:

Please include a recent balance sheet that reflects your student group's finances. (Data must be no more than 30 days old).

A balance sheet is a statement of the assets, liabilities, and capital of an organization at a point in time, detailing the balance of income and expenditure over the preceding period.

ASSETS	\$ Amount
Bank Balance	
Cash on Hand (petty cash, etc.)	
Accounts Receivable (<i>money that is owed to you by others</i>)	
Total:	

EQUITY & LIABILITIES	\$ Amount
Accounts Payable (<i>bills or expenses that you will have to pay, but not yet</i>)	
Accrued Expenses (<i>bills or expenses that you should have paid already, but haven't yet</i>)	
Other:	
Equity:	
Total:	

Budget:

Your budget should balance. (i.e. revenue matches your expenses)

Any expenses over \$300 must be accompanied with a quote or detailed breakdown.

REVENUES		
Source: (Include details, if appropriate)	\$ Requested or Confirmed	Status?
Applicant's Resources	\$350	CONFIRMED
URSU	\$2,000	<input type="checkbox"/> Confirmed

		<input type="checkbox"/> Requested
<i>E.g. RPIRG</i>	\$250	<input type="checkbox"/> Confirmed <input type="checkbox"/> Requested
<i>E.g. Ticket Sales (300 people X \$10/each)</i>	\$3,000	<input type="checkbox"/> Confirmed <input type="checkbox"/> Requested
<i>E.g. Dilawri Group of Companies</i>	\$1,200	<input type="checkbox"/> Confirmed <input type="checkbox"/> Requested
Total Revenue:	\$6,800	

EXPENSES		
Source: (Include details / description)	Anticipated Cost	Quote Included
<i>E.g. Cost of Food (350 people X \$15.00)</i>	\$5,250	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>E.g. Entertainment (5 performers X \$200/each)</i>	\$1,000.00	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>E.g. Decorations & Supplies</i>	\$200.00	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>E.g. Advertising & Promotions (poster design @ \$150, poster printing @ \$200)</i>	\$350.00	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total Expenses:	\$6,800	