

ANNUAL MEETING

OF THE

CHICAGO ORGANIZATION FUND

2018



**Center for
Student Involvement**

Agenda

▶ Introduction and Overview

- ▶ Call Meeting to Order
- ▶ Introductions

▶ Approval of Agenda

▶ Financial Report

- ▶ Document Submission to attendees

▶ New Business

- ▶ Presentation on COF Accounts, SOFAB, SAFC and SOOFA
- ▶ Presentation on Fundraising at UIC
- ▶ Treasurer support

▶ Wrap-up

- ▶ Questions and Final Comments

▶ Adjournment



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Financial Report of the COF



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Chicago Organization Fund (COF)



First and Foremost...

**You MUST be a
REGISTERED student
organization!!!**

COF Accounts: The Basics

- ▶ As a registered student organization, you already have a COF Account (automatically created after org. registration)
- ▶ Acts as a very basic, non-interest generating, *on-campus* bank account for your organization
- ▶ Not as many services as an off-campus bank account, but safer

COF Accounts: The Basics

- ▶ Zero balance until you add money
 - ▶ No automatic funding
 - ▶ No minimum balance required (unless applying for SOFAB or SOOFA funding)
- ▶ Documents needed to use account:
 - ▶ Report of Cash Receipts (deposits)
 - ▶ Disbursement Voucher* (member reimbursements and payment to vendors)
 - ▶ Vendor Information Form
 - ▶ Invoices (vendor payments)
 - ▶ Forms can be found in UIC Connection (*) or at <http://www.obfs.uillinois.edu/forms>

COF Accounts: Safety Features

- ▶ Minimum of two, maximum of three officers have access to the account
- ▶ Transition handled by Center for Student Involvement
- ▶ Officers with access cannot pay/reimburse themselves
- ▶ Limited cash withdrawals
- ▶ Documentation required
- ▶ No minimum balance, no immediate closing of accounts

COF Accounts: Deposits

- ▶ Report of Cash Receipts along with deposits (cash, check, or money order) go to the Cashier's Office in:
 - ▶ Marshfield Building, Room 116 between 11:30 a.m. and 4 p.m., OR
 - ▶ Student Center East, Room 224 between 9 a.m. and 4 p.m.
- ▶ Multiple items can be deposited on the same form (cash, checks, etc.)
- ▶ ALL money raised on campus must be deposited into your COF Account

COF Accounts: Withdrawals

- ▶ Documentation must accompany check request
 - ▶ Vendor Information Form, Disbursement Voucher, Invoice
 - ▶ Available in Campus Programs or online at <http://www.obfs.uillinois.edu/forms/accounting-financial-reporting>
 - ▶ Bring completed documents to Center for Student Involvement (SCE 340)
- ▶ Valerie Gordon, 312.413.5070, valerieg@uic.edu

Any questions about COF
Accounts?



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Pre-Meeting

- ▶ Mandatory
- ▶ Cannot occur the day of or day before a submission deadline, emails sent to Presidents, Treasurers, and third officers about how to schedule a meeting.
- ▶ Pre-meetings are for individual requests (if you have more than one request, you must schedule more than one pre-meeting)

DEADLINES AND DATES TO WRITE DOWN

| Funding Period Number | Event Dates | Pre-Meeting Deadline | Submission Deadline | Funding Hearing Dates |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| SUMMER 2019 SOFAB | Summer SOFAB | August 20, 2019 | Sept 6, 2019 | September 10,11,12 |
| 1 | Sept 23-Nov 1, 2019 | Sept 5, 2019 | Sept 6, 2019 | September 10,11,12 |
| 2 | Nov 2-Dec 9, 2019 | Oct 3, 2019 | Oct 4, 2019 | October 8,9,10 |
| 3 | Jan 13-Feb 21, 2020 | Nov 7, 2019 | Nov 8, 2019 | November 12, 13,14 |
| Winter Break | Dec 14, 2019-Jan12, 2020 | NO FUNDING PROVIDED | NO FUNDING PROVIDED | NO FUNDING PROVIDED |
| 4 | Feb 22-Mar 18, 2020 | Jan 23, 2020 | Jan 24, 2020 | Jan 28, 29, 30 |
| Spring Break | Mar 19-Mar 29, 2020 | NO FUNDING PROVIDED | NO FUNDING PROVIDED | NO FUNDING PROVIDED |
| 5 | Mar 30-May 1, 2020 | Feb 6, 2020 | Feb 7, 2020 | Feb 11, 12, 13 |
| Summer 2020 SOFAB | Summer 2020 | Mar 5, 2020 | Mar 6, 2020 | Mar 10, 11, 12 |
| 6 | Sept 7-Oct 2, 2020 | Mar 5, 2020 | Mar 6, 2020 | Mar 10, 11, 12 |
| Fall 2020 | Aug 24- Sep 6, 2020 | NO SAFC FUNDING PROVIDED | NO SAFC FUNDING PROVIDED | NO SAFC FUNDING PROVIDED |

SOFAB

- ▶ SOFAB is a funding body
- ▶ Source of funds: Interest from COF accounts
- ▶ Minimum balance required: \$25.00
- ▶ Event-based
- ▶ Must apply and present before event
- ▶ Funding done by reimbursement
- ▶ Event does not need to be open to all
- ▶ Can be used at off-campus events

SOFAB: The Basics

- ▶ SOFAB will fund:
 - ✓ Conference registration fees
 - ✓ Overnight accommodations
 - ✓ Transportation
 - ✓ Artist/Lecturer fees
 - ✓ Exhibits
 - ✓ Publications (must be free)
 - ✓ Charitable events on campus
 - ✓ Room rental or tech costs

SOFAB: The Basics

► SOFAB will NOT fund:

- × Food
- × Alcohol
- × Cab fare
- × General office supplies or equipment
- × Social events off campus
- × Charitable events off campus
- × Non-event-specific materials (i.e. org t-shirts)

All other items are determined by SOFAB

SOFAB Benefits

- ▶ Maximum of \$700 per semester (previously \$600)
- ▶ High rate of approval
- ▶ Application is fairly simple
- ▶ Short lead time

SOFAB: Application Tips

- ▶ Stay clearly within the guidelines
- ▶ Specifically describe your budget -
“Paint the Picture”
- ▶ Make sure your math is correct
- ▶ Do not ask for more than the maximum

COF Resources

▶ COF Accounts

▶ Forms

- ▶ COF Registration Form (part of organization registration)
- ▶ Report of Cash Receipts
- ▶ Disbursement Voucher
- ▶ Vendor Information Form

▶ Contact Info

- ▶ Valerie Gordon, 312.413.5070, valerieg@uic.edu

▶ SOFAB

▶ Forms

- ▶ Guidelines
- ▶ Deadlines
- ▶ Application

▶ Contact Info

- ▶ Campus Programs website: <http://campusprograms.uic.edu>

Any questions about SOFAB?



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Student Activities Funding Committee (SAFC)

- ▶ Committee comprised of students, faculty and staff
- ▶ Events should be free and open to the campus community
- ▶ Events must be held on campus
- ▶ Lead time is 6-8 weeks
- ▶ Proposal process is very involved because events are larger



SAFC Proposal: Basics

- ▶ A student organization can receive up to \$7,000 for a single-day event or \$14,000 for an event series
- ▶ Organizations may present multiple times up to a max of \$14,000 per year
- ▶ SAFC will fund:
 - ✓ Performer costs
 - ✓ Advertising costs
 - ✓ Tech and other overhead costs
- ▶ SAFC will not fund:
 - ✗ Food
 - ✗ Giveaways
 - ✗ Decorations
 - ✗ General supplies

SAFC Proposal: Planning

- Reserve event space through Venues and Events or other location
- Contact performers - i.e. DJs, speakers...
 - Confirm with performers, but DO NOT sign contracts
 - Obtain biographies or resumes for each performer
- Determine who will design the publicity materials
- Price quotes - i.e. food, costumes, publicity

SAFC Proposal: Tips

- ▶ PRE-MEETING IS REQUIRED
- ▶ Plan effectively - Know what your needs are
- ▶ Be transparent - Lay out your entire budget and reasoning
- ▶ Seek additional sources of funding (in-kind, university departments, corporate and non-profit partners)
- ▶ Make sure your proposal is complete and ACCURATE
- ▶ Know your program and be able to present it to the SAFC

*The best way to accomplish this is to plan ahead and
Be Organized!*

SOOFA

- ▶ A new stream of funding dedicated to advertising, recruitment event refreshments (through UIC Catering), promotional items and office supplies.
- ▶ Funding to support organizations growth
- ▶ Allocations no more than \$200 a year
- ▶ Funding requests are through application process similar to SAFC and SOFAB and will make a presentation to the committee
- ▶ Successful groups will submit receipts for reimbursement similar to SOFAB
- ▶ Groups must have minimum of \$25 in their COF account
- ▶ Flyers, newsletters, websites, awards, office supplies, etc.
BUT NO APPAREL

The Bottom Line:

There is money available to support your organization's programs and events. You just need to go get it.

Final Questions and Comments

