

# SAF Annual Proposal Form for the 2015- 2016 Academic Year

The SAF Committee will be accepting applications for the annual budgeting cycle from November 24, 2014 until 5:00pm on January 14th, 2015. The intent of the annual operating budget is to support on-going student activities, services, and programs. Services and Activities Fees are defined in RCW 28B.15.041 to mean "fees, other than tuition fees, charged to all students registering at the . . . state universities . . . The legislature also recognizes that Services and Activities Fees are paid by students for the express purpose of funding student activities and programs" of their particular institution. These funds will be available for the 2015 to 2016 academic year.

A member of your group must be available to attend a hearing with the SAF Committee tentatively scheduled for Friday, February 6, 2015 and February 13, 2015. Please include a regularly checked email in the application, as that will be the main form of communication between SAF and the requesting group. The SAF Liaison will contact the requesting group to notify them of a hearing time.

Please ensure that your request is in accordance with SAF Bylaws, which are available at the following website: <http://www.uwb.edu/studentlife/safc/safbylaws>. Please note the SAF Committee will be coordinating with Club Council to develop an efficient funding model.

The Committee will hold an open forum and appeals, tentatively scheduled for on Friday, April 3, 2015. Requesting groups will be notified of a preliminary budget before the open forum and appeals date.

Late applications will not be accepted, except at the discretion of the Committee. Adjustments to the final total requested by any club, group, organization, or department will not be accepted. After a request has been submitted, it may not be reopened for alterations or changes.

## SUBMITTED BY

Financial Management Association – Bothell chapter (RSO)  
12ivani@gmail.com  
Jan 14, 2015, 01:46PM PST

## SAF Annual Proposal Form

[Required] Proposing Group Financial Management Association – Bothell chapter (RSO)

(i.e. Career Center, Sustainability Club, Campus Events Board, etc.)

[Required] Department/Organization UW Bothell School of Business

(i.e. Student Services, CUSP, Student Life, Student Clubs & Organizations, etc.)

[Required] Contact Person Ivan C. Inchauste – FMA Treasurer

This person will be the sole point of contact for any questions or additional information requests from the SAF Committee regarding your proposal.

[Required] Contact Email 12ivani@gmail.com

This person will be the sole point of contact for any questions or additional information requests from the SAF Committee regarding your proposal. Please include a regularly checked email as the SAF Committee contacts groups primarily through email.

[Required] Contact Phone (425) 698 – 7904

Please include the phone number of the contact person. This person will be the sole point of contact for any questions or additional information requests from the SAF Committee regarding your proposal.

[Required] Faculty/Staff Member Philip Palm, Club Advisor

Please discuss your request with a staff or faculty member (i.e. Student Life Staff or faculty advisor) before submitting your request and include the name and title (i.e. John Smith, Club Advisor) of that individual.

[Required] Faculty/Staff Member Email ppalm@uwb.edu

Please provide the email of the faculty or staff member you discussed your request with.

[Required] Executive Summary of Your Proposal

Please provide a concise overview of the program, activity, or service for which you seek funding.

Please reference the University of Washington Bothell's 21st Century Initiatives at the following website and, if and where appropriate, please refer to the applicable initiatives: <http://www.uwb.edu/21stcentury>

The Financial Management Association is an internationally recognized organization sponsored by college and university chapters. The FMA through its chapters offers members the opportunity for personal and professional growth through leadership, career development, networking, and service opportunities. The University of Washington Bothell chapter of the FMA is committed to the aforementioned, by holding bi-monthly club meetings open to all UW students, hosting alumni and local financial professionals, as well as sending students to annual conferences such as the FMA leadership and G.A.M.E. conference. These conferences bring together students, faculty, and industry leaders together to discuss, network, and learn about the latest advancements in the field of finance. Membership in the FMA, club meetings, and events are encouraged and open to all University of Washington Bothell students. FMA membership provides student members with the following: \_ Publication & Online resources – Journal of Applied Finance, Financial Management, Careers in Finance. \_ Conferences – FMA Leaders Conference, FMA Annual Meeting, & other FMA sponsored. \_ Awards, Recognitions, & Scholarships – National Honor Society, Collegiate Fellows, Superior Chapter Awards, Membership Development Awards, Superior Faculty Advisor \_ Other Benefits – Complimentary AAll Membership, On-line Conferences, FMA Competitions, Access to FMA Professional & Student Membership Directory.

**[Required] Need for this Program/Service**

In 200 words or less, please do the following:

- Describe the need for this program or service.
- If possible, include any data that might support your proposal (i.e. surveys indicating a need for your initiative).
- If you have tracked the success of this program or service in the past, please provide that information here.

Many students have a career interest in jobs related to finance. The FMA club provides an opportunity for both finance concentration students and other students to network with professionals in related fields and to deepen their knowledge of finance, which will assist them as they seek work after completing their studies. In the past three years over 90 undergraduate students have been involved in the FMA club and have benefited from its activities.

**[Required] Estimate number of students that will benefit from your proposed program/service.**

In 200 words or less, please do the following:

- Indicate the benefits of your proposed program for students.
- Estimate how many currently enrolled students will likely benefit from your proposed service or program.
- Estimate the number of any other individuals (and indicate their affiliation) that might benefit from this service or program.

**Participants:**

FMA Club members – 32 students

FMA Leadership conference – 11 students

G.A.M.E. conference – 6 students

Social media posting prior and during conference by student participants citing activities the group part takes in throughout the weekend. In addition, student participants upon returning will create a Wiki page posting pictures and describing their experiences in a presentation to other students in other classes. We expect 200 students will see a prepared presentation either in classes or at the planned open forum for all students on campus.

**[Required] How do you plan to assess the program or service?**

How do you plan to track the effects of this program or service?

For example, how would track how the event/program/service went? How would you track how successful it was and what you could change in the future?

We will assess each of the three planned activities that would be funded by this request in terms the number of students directly participating, the number of students who directly benefit from post-trip presentations and the number of students able to access information and an online presentation that will be prepared by the participants.

**Additional Information**

If needed, please include any other information you feel is relevant to your request. (There is no character limit on this field.)

<http://www.fma.org/Student/>

<http://www.fma.org/Student/FLCFlyer2015.pdf>

<http://www.quinnipiac.edu/game-forum/game-v-forum-%28academic%29/>

**Salary/Wages**      N/A

Describe the funds you are requesting in detail below.

Please put total dollar amount of salary/wages in the bottom of this box.

**Benefits**      N/A

Describe the funds you are requesting in detail below.

Benefits paid to regular employees working at least .50 FTE should be calculated at 34.0% of earnings. Benefits paid to hourly employees should be calculated at 16.5% of earnings.

Please put total dollar amount of benefits in the bottom of this box. If you included salaries/wages in the above field, you must calculate the applicable benefits.

**Programming/Events**

Describe the funds you are requesting in detail below.

Please put total dollar amount of programming/events in the bottom of this box. Please include in this box costs relating to security, honorarium, hospitality, and contracted costs, etc. If your request includes security and you would like an estimate, please contact UWB Security at 425-352-5359.

FMA Annual Leadership Conference (New York - March 2016)  
1x Faculty & 5x Students  
Conference Fee \$165 per attendee (6x) = \$990.00  
See Transportation & Meals and Lodging for Travel for additional expenses.

G.A.M.E. Forum Conference (New York – March 2016)  
1x Faculty & 10x Students  
Conference Fee \$275.00 per student/ \$300 per faculty = \$3,050.00  
See Transportation & Meals and Lodging for Travel for additional expenses.

Facilities Rentals/Set-Ups N/A

Describe the funds you are requesting in detail below.  
If you require facilities rentals/set-ups, please indicate it here. Take into account custodial fees and clean up. If you need assistance with estimated costs, please speak to a staff/faculty member.  
Please put total dollar amount of facilities in the bottom of this box.

Printing & Photocopying N/A

Describe the funds you are requesting in detail below.  
Please put the total dollar amount of printing/photocopying in the bottom of this box.

Office Supplies N/A

Describe the funds you are requesting in detail below.  
Please put the total dollar amount of office supplies in the bottom of this box.

Food/Refreshments 3 large pizzas during each bi-monthly meeting throughout school year \$810.00  
Soft drinks \$180.00

Describe the funds you are requesting in detail below.  
Please put the total dollar amount of food/refreshments in the bottom of this box.  
Please review the food policy/food form for the University policies before submitting your request at the following link:  
<http://www.uwb.edu/getattachment/admin/services/fuac/foodapprovalform.pdf>

Equipment Rentals/Purchase N/A

Describe the funds you are requesting in detail below. Include information on the purpose/need for this equipment as it relates to your program or service.  
Please put the total dollar amount of equipment rentals/purchase in the bottom of this box.

#### Transportation

Describe the funds you are requesting in detail below (indicate in state/out of state, as well as type of transportation). Please note that flight bookings are done through the University.  
Please put total dollar amount of transportation in the bottom of this box.

FMA Leadership Conference (New York)  
Airfare – Alaska Airlines \$408.00 per person (6x) Round Trip = \$2,448.00

G.A.M.E. Forum Conference (New York)  
Airfare –Alaska Airlines \$408.00 per person (11x) Round Trip = \$4,488.00

#### Meals and Lodging for Travel

Describe the funds you are requesting in detail below. Please insure that you are in compliance with applicable per diem rates for meals. The rates are available at the following link: <http://www.gsa.gov/portal/category/21287>  
Please note that hotel bookings are typically done through the University.  
Please put the total dollar amount of meals and lodging in the bottom of this box.

FMA Leadership Conference (New York)  
Lodging – 3x room @ the New York Hilton @ \$256.00 per night for 3 nights = \$2,304.00  
Meals - \$55.00 per day (3x) per attendee (6x) = \$990.00

G.A.M.E. Forum Conference (New York)  
Lodging – 6x rooms @ the New York Hilton @ \$256.00 per night for 4 nights = \$4,608.00  
Meals - \$55.00 per day (4x) per attendee (11x) = \$2,420.00

Telecommunications N/A

Describe the funds you are requesting in detail below.  
Telephone equipment should be estimated at \$35 per handset, per month (this includes only one extension).  
Please put the total dollar amount of telecommunications in the bottom of this box.

Other N/A

Please include any other expenses that don't fall under any of the above categories in detail.  
Please put the total dollar amount of other in the bottom of this box.

[Required] Total Amount Requested \$22,288

Please take the time to carefully add all of your figures from above. Please note that adjustments will not be made to the total amount requested in the event of an error. Round your final total up to the nearest dollar.

[Required] Terms and Conditions  I Agree

-I have read and agree with the terms and conditions of the SAF Bylaws: <http://www.uwb.edu/studentlife/safc/safbylaws>

-I understand that once submitted, adjustments cannot be made to the total amount requested above.

-I understand that hearings will be held between 8:00am and 11:00am, tentatively scheduled for Friday, February 6, 2015 and Friday, February 13, 2015. Someone from my group will be available to attend a brief hearing scheduled during that time frame.