

The Ohio State University

Report on the Student Activity Fee

Ad Hoc Committee for the Review of the Student Activity Fee
12/30/2008

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I. Executive Summary

Chair of CSA Alex Swain established the Ad Hoc Committee during summer quarter 2008 to address issues surrounding the distribution and amount of the Student Activity Fee. See Appendix F for the charging document. The Ad Hoc Committee members were:

Ben Anthony (USG)
Ted Bauer (IPC)
Matt Couch (Ohio Union)
Kerry Hodak (Chair, graduate student)
Peter Koltak (USG)
Jason Marion (CGS)
Julie Jones/Jeff Pelletier (CSA Accountant)
Xen Riggs (Student Life)
Dave Stetson (Faculty)
Tracy Stuck (Student Life)
Alex Swain (CSA)
Liza Toher (CGS)
Dave Wiseley (Ohio Union)

The Ad Hoc Committee met 25 times for over 60 hours. The topics reviewed by the Ad Hoc Committee included the inclusion of non-SAF funded large campus events in the SAF portfolio, the budget levels of existing SAF funded entities, the funding policies for approved student organization programming, operating budgets for SAF support units (Graphics and the SOURCE), staffing, a possible increase in the SAF, and issues with carry-forward, particularly funds remaining in the student organizations budget line at the end of each fiscal year. With a strong overtone of fiscal responsibility, the Ad Hoc Committee evaluated each of the currently-funded entities and those the Ad Hoc Committee decided ought to be funded through the SAF. The Ad Hoc Committee evaluated the mission and charge of each funded entity and the likely expectations of new programs which the Ad Hoc Committee is recommending for SAF funding. With this information, the Ad Hoc Committee recommended budget changes to better serve students and more effectively utilize the SAF. As part of that analysis, the Ad Hoc Committee addressed the issue of the amount of the current fee and an appropriate fiscally responsible fee level to accomplish the mission of the SAF and meet student expectations. Overall, the Ad Hoc Committee realized that the funded entities of the SAF have suffered due to inflationary erosion of buying power. In addition, the fee was not meeting the demand. Furthermore, the fixed costs to manage the SAF and ensure its continued success have not been, but should be secured with a fixed funding base. Additionally, the Ad Hoc Committee determined that a number of large campus events that benefit students ought to be included under the SAF umbrella through partial financial and non-financial support.

After extensive deliberations, the Ad Hoc Committee recommends the following:

- Increase the budgets of the Ohio Union Activities Board, Explore Columbus, Student Governments, and Alternative Breaks
- Allocation of an additional \$50,000 to graduate and professional student programming by OUAB for a minimum of \$100,000 from the OUAB budget
- Continuation of the current amount of funds for student organization programming and operations

- Direct payment of approved student organization programming expenses through 100Ws and procurement cards to reduce the amount of programming expenses directly charged then reimbursed with SAF funds to student organizations
- Coverage from a common fund for capital costs due to the transition to the new Ohio Union incurred by the student governments
- Expansion of the Graphics unit to include video production
- Direct allocation of an operating budget for SAF support units – Graphics/Video and SOURCE
- An operating budget of \$125,000 for the SOURCE
- An operating budget of \$75,000 for Graphics/Video
- Expansion of the SAF to partially fund select large campus events termed Signature Events
- Designation of African American Heritage Festival, Best Day of Your Life, Block “O” Watch Parties, BuckeyeThon, Commencement Week, Days of Service, International New Year’s Eve Party, La Fiesta, Major Campus Events Committee, PHC Spring Step Show, Taste of OSU, Thanksgiving as Signature Events
- An approximately \$225,000 budget for Signature Events
- Oversight of Signature Events through Ohio Union Council as designated by CSA
- Limited SAF funds for staffing to cover specific functional areas
- A maximum of \$300,000 for staff supervised by the Ohio Union to support the SAF
- Expenditure of approximately \$171,000 for equipment to enable expanded services at the new Ohio Union
- Increase of the SAF \$10 per quarter for a total of \$25 per quarter
- Assess all fulltime students, regardless of credit hour enrollment, the full fee
- Allocation of the fixed costs and then division of the fee to variable cost entities on an annual basis

Fixed Costs	Amount
Graphics/Video Production	\$75,000
SOURCE	\$125,000
Staffing	\$300,000
Reconciliation	\$10,000
	Percent
Variable Costs	
Ohio Union Activities Board	52.75%
Student Organizations	15.00%
Explore Columbus	15.00%
Student Governments	8.50%
USG	65.00%
CGS	25.00%
IPC	10.00%
Signature Events	7.00%
Alternative Breaks	4.00%

- Additional expenditure of fixed costs for equipment not covered by FY09 carry forward in FY10
- Implementation of the Carry Forward Allocation Process

The following report provides further detail and rationale for each of the above recommendations.

II. Background and Overview of Recommendations

The Student Activity Fee [hereinafter SAF] was established in 2003. The implementation of the fee was support by the three student governments with oversight of the fee delegated to the Council on Student Affairs [hereinafter CSA]. At that time, the student governments agreed on specific provisions for the implementation of the fee. However, that agreement was only established for the first five years of the fee with the expectation that CSA would undertake a review of the fee to make any necessary adjustments. Historically, the fee was allocated to various entities based on an established percent of the fee. Fixed operating and staffing costs were not directly paid out of the fee. Some operating costs were paid through the individual budget lines while the Ohio Union paid for most of the staff necessary to implement fee based programs.

Historically, the implementation of the SAF focused only around the percent of the SAF allocated to each budget. Following that pattern, the principal recommendations for those entities considered variable costs to the fee are the percent allocation after fixed costs from the SAF. The dollar amounts for those entities provide justification for the ultimate percent allocation recommendations and a more concrete example of how the Ad Hoc Committee envisions the effect of its recommendations. The percent allocations roughly equal the illustrious dollar amounts discussed in the sections pertaining to each SAF funded entity. Pertaining to Signature Events, the budget allocated is a percent of the overall fee for all programs combined. The further recommendation for each individual event is a fixed dollar amount for the first year of allocation, with subsequent allocations to be determined by CSA upon recommendation of Ohio Union Council. Breaking from tradition, the Ad Hoc Committee identifies fixed costs that must be funded prior to allocation of variable costs. Rather than treating the fixed costs as a percent of the fee. The Ad Hoc Committee recommends a specific dollar amount for each of those budgets to be allocated prior to those variable costs which are allocated a percentage of the remaining amount of the SAF.

III. SAF Funded Organizations and Programs

At the beginning of the review process, the Ad Hoc Committee decided to accept the previous report's conclusions that all of the currently funds SAF programs have successfully achieved their mission and charge. Therefore, a comprehensive review of each program to justify receipt of any SAF funds was not undertaken. It is expected that such a review is more appropriate at a future time, approximately in three to four years. The Ad Hoc Committee focused its review of currently funded programs on the buying power of the current budget for each program, the use of those funds, the student populations served, the impact of a new student union building, and the impact of inflation on the opportunities provided to students by the SAF. Each program was considered independently of other programs funded by the SAF with the overriding understanding that funds are limited and the Ad Hoc Committee's role as a steward of student funds. Each program is addressed below.

Ohio Union Activities Board

In FY09, Ohio Union Activities Board [hereinafter OUAB] was allocated 55% of the SAF. Upon review of the mission and charge of OUAB, the Ad Hoc Committee concluded that the OUAB programming has been substantially affected by inflationary erosion. OUAB is unable to sponsor a full range of events. There is now a trade off between one large show and several small and medium-sized programs each quarter. OUAB provided a more extensive and better mix of programs in 2003. It is increasingly difficult

to host a Welcome Week concert, large winter event, and the Big Free Concert in the spring and continue the same level and diversity of programming offered during the first three years of SAF funding. OUAB has suffered substantial erosion of its buying power. The best example is the proposed plan for winter quarter 2009. The choice of programming is one large-scale event or a series of smaller events. Ideally, both the large events and the series of event could occur. Both could have occurred during the first couple of years of the SAF. The Ad Hoc Committee determined the necessity of an addition to the OUAB budget of approximately \$525,000, a 40% increase in budget. See section VIII for the recommendation pertaining to the percent allocation of the SAF for OUAB. In addition, the Ad Hoc Committee recommends that OUAB allocate a minimum of \$100,000 to graduate and professional targeted programming, a 100% increase over the current minimum requirement.

Student Organizations

In FY09, Student Organizations were allocated 18%¹ of the SAF to provide programming and operating funds for student organizations. On average, only 60% of the funds are used each year. This is a significant under-utilization of funds. The Ad Hoc Committee investigated the reasons for this situation. One of the key explanations is the difficult process for reimbursement of expenditures for most student organizations which is in part necessitated by University spending guidelines and lack of staff to administer a different funding system. Unless the student organization had a large source of funds or a close relationship with an academic department or other support unit, student members of the organization would be responsible for fronting up to \$3,000 for an event. The redemption rates were the lowest for undergraduate student organizations, followed by graduate student organizations, and then professional student organizations. This is financially burdensome on students. Other potential causes of the redemption issues include but are not limited to lack of appropriate planning, unexpected difficulties with scheduling, and cancellation after submission and approval of funding.

Based on the historic underuse of funds and the inherent problems with the funding structure, the Ad Hoc Committee makes two recommendations. First, the reimbursement model should change to allow for payment of programming expenditures directly. This would occur through the use of 100Ws (the largest percent of reimbursement are made for expenses incurred from University departments) and use of procurement cards. The Ad Hoc Committee suggests implementing a trial using 100Ws during winter quarter 2009 and a procurement card trial during spring quarter 2009. A Taskforce to ensure support for this project and its implementation would be useful. The Ad Hoc Committee determined that that the current amount of the allocation for student organizations is an appropriate amount to support student organizations for the immediate future with the SOURCE receiving an independent allocation.² See section VIII for the recommendation pertaining to the percent allocation of the SAF for Student Organizations. With these two recommendations, the Ad Hoc Committee expects that the redemption rate will increase and total expenditures for student organization operating and programming funds will better match the allocation to the student organization line from the SAF.

Explore Columbus

In FY09, Explore Columbus received 12% of the SAF. Each year since the implementation of the fee, Explore Columbus has ended the year fully expending its allocation. Furthermore, based on the

¹ The published allocation is 20%. However, 2% of the SAF is allocated to the SOURCE for operating. The SOURCE is discussed on pages 6-7.

² The SOURCE is discussed on pages 6-7.

asymptotic model for ticket purchase and sale, each dollar of the fee buys approximately \$1.67 worth of tickets. The program is also utilized well by graduate and professional students unlike other programs offered through the SAF. In addition, the demand far exceeds the available offerings. Similar to OUAB, Explore Columbus has also experienced inflationary erosion of its buying power. Due to the full use of funds and popularity of the program, the Ad Hoc Committee determined that the Explore Columbus budget should increase approximately \$225,000, an 81% increase in budget. See section VIII for the recommendation pertaining to the percent allocation of the SAF for Explore Columbus.

Student Governments

In FY09, the Student Governments were allocated 10.3% of the SAF.³ Over the course of SAF funding, the student governments have met with various degrees of success in utilizing their budgets funded through sources including the SAF, Coca-Cola endowments, and professional development funds provided by Academic Affairs. Both IPC and USG did not think that an increase was warranted at this time. However, both requested that the capital costs projected due to the new Ohio Union are paid out of a general allocation for all SAF funded entities. The Ad Hoc Committee recommends that the capital costs as outlined in Appendix A are covered for all student governments as discussed later in this document. After a lengthy discussion and evaluation of the CGS budget, the Ad Hoc Committee agreed that the CGS budget should increase approximately \$10,000, a 25% budget increase. That is approximately half of the additional expenses that CGS indicated they would incur if their program for all advocacy and organizational development work would be realized with an increase in budget. Therefore, the Ad Hoc Committee determined that the total increase needed for the student government line is \$16,000 (accounting for the annual IPC supplement), a 7% increase in budget. See section VIII for the recommendation pertaining to the percent allocation of the SAF for Student Governments. Furthermore, the Ad Hoc Committee recommends that the distribution of the fee shall be allocated based on the needs of each individual student government rather than a flat distribution between the three student governments as occurred in the past. See section VIII for details on the individual student government distributions. Additionally, if the fee is increased, the Ad Hoc Committee recommends that a total allocation less than 10% of the SAF is appropriate for the student governments when considering the student government line as a whole.

Alternative Breaks (Formerly Alternative Spring Break)

In FY09, Alternative Breaks received 3% of the SAF. The program provides alternative, service related trips during academic breaks—winter, spring and summer. Currently, as many as 50% of applicants for each of the three break programs are unable to participate due to lack of available positions on trips. Additionally, Alternative Breaks is working on an initiative to attract more graduate and professional students to participate in the program. Based on the high unmet demand and desire to better serve all student populations, the Ad Hoc Committee determined that the Alternative Breaks' budget requires an increase of approximately \$75,000, an 108% increase in annual allocated budget. In the past, Alternative Breaks' budget has been supplemented by prior year's carry forward allocated to Alternative Breaks by CSA. Therefore, the "real" increase is less than 100% and demand is expected to increase as more graduate and professional students participate in the program. See section VIII for the recommendation pertaining to the percent allocation of the SAF for Alternative Breaks.

³ The listed percent is 10. However, since the implementation of the SAF, IPC received a \$6,000 supplement to its portion of the 10%. Therefore, USG and CGS received 10% of the fee paid by their constituents and IPC received approximately 14% of the fee paid by its constituents.

IV. Operating Costs of SAF Support Units – SOURCE and Graphics

As part of the review, the Ad Hoc Committee analyzed those units that were created to support the fee in 2003. When the fee was implemented, the plan for implementation did not include operating expenses or staffing expenses. Therefore, the SOURCE has been primarily funded through the student organization budget line and Graphics at the grace of the Ohio Union. The operating budgets for both units are not fixed and secure. In addition, the review of the SOURCE operations indicated that insufficient funding has been available for repair and renewal of equipment and programming. In the new SOURCE space at the Ohio Union, use of the SOURCE and the desire for programming provided by the SOURCE will increase exponentially. Currently, the \$50,000 allocation from the student organizations budget is insufficient to meet needs of student organizations and provides little flexibility to provide student and organizational development opportunities in the context of student organizations. Similar to the SOURCE, the Graphics unit is inundated with projects. The wait for student organizations is substantial and at times a deterrent to use. In addition, multimedia is becoming increasingly relevant to student organizations and will be even more so with the opportunities for electronic marketing at the new Ohio Union. Therefore, the Ad Hoc Committee found that both the SOURCE and Graphics are underfunded and cannot meet expectations with the current budget. Furthermore, the Ad Hoc Committee decided that the best practice is to provide for fixed costs prior to allocating variable costs (programming). Therefore, the Ad Hoc Committee recommends that the SOURCE and Graphics have independent allocations prior to allocating the fee to those entities that receive a percent of the fee. The essential budget for the SOURCE is \$125,000, a 150% increase in budget over the current allocation through the student organization budget line. The Ad Hoc Committee recommends the expansion of the Graphics unit to include video production. The Ad Hoc Committee recommends a \$75,000 budget for the joint Graphics/Video Production unit. See section VIII for the recommendation for additional information.

V. Funding for Signature Events

Overview: The Ad Hoc Ad Hoc Committee started with a very broad array of potential programs that are or could develop into large campus-wide events. The list is included below:

Facilitated through Major Campus Events Committee [hereinafter MCEC]:

Welcome Week – Student Involvement Fair
Homecoming – Homecoming Parade
Beat Michigan Week
Winter Involvement Fair
Step, Stride, and Swim (Expanded Spielman event)
Go Nuts for Arts
CarnOval
Shout at the Schott B-ball Pep Rally
Movie/Campout at the Stadium

Other Facilitators:

Community Commitment – Ohio Union/SERV Team
African American Heritage Festival – Student committee/MCC
Greek Week – Greek Governance Organizations

Rock the Block – USG
 Best Day of Your Life – Ohio Staters, Inc.
 Hemp Fest – Students for Sensible Drug Policy
 Commencement Week – Ohio Union
 BuckeyeThon – Student Organization
 Relay for Life – Student Organization
 Taste of OSU – OIA
 International New Year’s Eve Party – OIA
 May Week – SAC/Alumni Association
 PHC Spring Step Show –PHC/Ohio Union
 Buck-i-Frenzy – Student Life
 Parent and Family Weekend – Ohio Union/Student Life
 Sibs Weekend – In transition
 Images of You – University Housing
 SAIL – Ohio Union
 Thanksgiving – OMA/OIA
 ExploreAsia – MCC
 Mortar Board Pillow Fight – Mortar Board, Inc.
 Block “O” Watch Parties – Block “O”
 AIC/MCC/AIS Powwow – MCC
 Drums and Dough – MCC
 Picnic with the Buckeyes – USG
 MLK Day of Service – Ohio Union/SERV Team
 Block “O” Kickoff Meeting and Pep Rally – Block “O”/Athletics
 Renaissance Festival – Student Organization
 GlobalFest – Recreational Sports

The Ad Hoc Committee narrowed the list above based on the impact on the student experience, the funding and organizational model, the size of the event and/or potential size of the event, the history of the event, the audience served by the event, and maximization of funds potentially available. The Ad Hoc Committee requested proposals from the following organizations (* indicate organizations that did not submit proposals). After review of the proposals to determine those events that would be most appropriately funded by the fee based on the above criteria, the Ad Hoc Committee then heard proposals from a select number of programs (those programs are indicated by +).

African American Heritage Festival+
 AIC/MCC/AIS Powwow+
 Best Day of Your Life+
 Block “O” Watch Parties+
 Block “O” Kickoff Meeting and Pep Rally*
 BuckeyeThon+
 Commencement Week+
 Community Commitment+
 Drums and Dough
 ExploreAsia
 Family Affair and Reunion+
 GlobalFest+

Hemp Fest*
 International New Year's Eve Party+
 La Fiesta+
 Major Campus Events Committee (Ad Hoc Committee decided to consider all MCEC events together)+
 MLK Day of Service+
 May Week
 Mortar Board Pillow Fight*
 PHC Spring Step Show+
 Parent and Family Weekend
 Rock the Block*
 SAIL Conference
 Sibs Weekend
 Thanksgiving+
 Taste of OSU and World Carnival+

After the presentations, the Ad Hoc Committee determined a funding procedure should any signature event receive funding. The funding procedure is attached as Appendix X. The Ad Hoc Committee evaluated each program in light of a finalized definition of a signature event and funding priorities given the limited funds available.

Signature Event: A program that attracts or has the potential to attract 1000 student participants that is identified with OSU. The program shall enhance social and community engagement while broadening the Ohio State experience for all students.

Priorities:

1. Potential for success
2. Value/Fiscal Responsibility
3. Diversity, Community Building, and/or Outreach to underserved populations
4. Tradition/History of Success
5. Academic and Education Merit

Based on the above priorities, the Ad Hoc Committee determined that the following events are appropriately funded in part by the SAF. (See Appendix B for detailed information regarding recommended SAF funds for each program and sponsor commitment):

African American Heritage Festival
 Best Day of Your Life
 Block "O" Watch Parties
 BuckeyeThon
 Commencement Week
 Days of Service
 International New Year's Eve Party
 La Fiesta
 Major Campus Event Committee
 PHC Spring Step Show
 Powwow
 Taste of OSU

Thanksgiving

During the course of the evaluation of the varieties of pre-existing programs that could be funded by the SAF, the Ad Hoc Committee decided that it was most appropriate to use SAF funds to provide a minimum level of financial security and reduce the amount of time spent on fundraising in contrast to event planning and development for each of the events selected. Therefore, the expected impact of the SAF funds is designed to provide for program enhancement.

Any program that is selected for funding must abide by and agree to requirements established by CSA and administered by the Ohio Union Council (See appendix C for further details). To determine the final list of recommended events, the chair of the Ad Hoc Committee presented a general outline of the requirements for SAF funding to the departmental sponsors. The departmental sponsor was required to agree to the general structure of management of the programs as well as an annual financial commitment.

After meeting with the departments and organizations, they responded to the request for agreement to the general terms and conditions of SAF funds for each event. All events gained department support except for the Powwow. The Multicultural Center did not commit to funding for the Powwow because it is still evolving and requires more focused development by AISS faculty and AIC students. The Ad Hoc Committee felt strongly that the programs selected would only be enhanced and successful if there was a financial commitment on the part of the department. Based on the information gathered during the evaluative process and commitment by the event sponsors, the Ad Hoc Committee recommends that the following programs are designated Signature Events, with funds allocated as indicated in Appendix B:

African American Heritage Festival
Best Day of Your Life
Block "O" Watch Parties
BuckeyeThon
Commencement Week
Days of Service
International New Year's Eve Party
La Fiesta
Major Campus Event Committee
PHC Spring Step Show
Taste of OSU
Thanksgiving

The Ad Hoc Committee determined that approximately \$225,000 is necessary to support Signature Events. As indicated in the document in Appendix C, the Ad Hoc Committee recommends that an opportunity to apply for SAF funding from other events seeking signature event status occur every three years beginning in spring 2012.

VI. Staffing

When the SAF was implemented in 2003, insufficient provisions were made for staff to administer the fee. At that time, the Ohio Union committed its own resources to ensure the success and impact of the SAF. In addition to staffing, the Ohio Union provided operating budgets for various departments funded by the SAF. This was possible largely due to the operation of the existing Ohio Union building and fixed, under-

market utility costs. Without this staffing support, programs such as Explore Columbus, Alternative Breaks, the SOURCE, Graphics, and OUAB would not have become successful.

With the probability of a general funds cut and future higher costs of operating a new building, particularly increased utility costs, it will not be possible for the Ohio Union to continue to support the SAF at the necessary level. Therefore, it is pertinent that the SAF provide part of the necessary administrative support ensuring successful programs and brilliant experiences and opportunities for all Ohio State students. Without this SAF support, more student-friendly policies for student organization programming, extension of services through the SOURCE, better marketing of SAF funded programming, and student development will not be possible. The Ad Hoc Committee identified functional areas that are necessary for the successful implementation of the SAF.

Functional Breakdown of Staff Responsibilities:

Each area of functional responsibility may relate to one or multiple positions. Therefore, the needs of fee implementation might require two accountants. It is also possible that a particular area would only require .50 FTE or in the case of other areas 2 FTE. The Ohio Union will use its discretion in consultation with appropriate bodies including CSA to determine the appropriate distribution of staffing and allocation of the staffing funds available. Below is a non-exhaustive list of the staffing support necessary for adequate implementation of the SAF:

Accounting: Oversee the process of approval of SAF funds for student organizations. Enable the use of 100W and Procurement cards for the pre-payment of program related expenses. Ensure compliance with all applicable accounting and auditing standards for SAF funds.

Graduate and Professional Programming: Advise the Grad/Prof Committee of OUAB. Serve as a liaison between the Ohio Union, IPC and CGS. Enhance the marketing program targeting graduate and professional students. Work to ensure the graduate and professional interests are related to SAF funded programs—Explore Columbus, OUAB, Signature Events, and Alternative Breaks.

Student Organizations: Provide support for student organizations. Provide training and development opportunities. Oversee the operations of the SOURCE.

Large Campus Programming: Advise OUAB. Provide training and support for student members of OUAB. Monitor SAF funds managed by OUAB. Assist students in meeting standards and requirements as established by CSA. Coordinate the Signature Events Committee. Coordinate training for Signature Events student chairs. Coordinate communication between Signature Events and Ohio Union Council. Oversee expenditures of funds for Signature Events.

Student Government Support: Assist student governments with projects and programs. Serve as the office manager.

Graphics and Video Production: Provide high quality marketing and organizational development designs and materials. Assist with video production for student organizations.

The Ad Hoc Committee recommends that \$300,000 is allocated as a fixed cost for staffing to cover the functional responsibilities described above. The Ad Hoc Committee recommends that the Ohio Union

supervise the staff and that an Memorandum of Understanding [hereinafter] MOU is signed between CSA, the Ohio Union, and Student Life outlining the requirements for funding from the SAF for staffing. The Ad Hoc Committee recommends that the MOU include reports on the use of funds for staffing to CSA at least annually.

VII. Capital Equipment Costs for Expanded Programming in the new Ohio Union

The Ad Hoc Committee reviewed the impact of completely new and uniquely-designed spaces to house both operational and programmatic aspects of SAF-funded entities. The transition to the new Ohio Union will lead to additional operational costs as well as one-time capital equipment expenses. Because of the expected increase in demand for services by students due to the central location of the new Ohio Union and student organization support services, the SOURCE and Graphics and Video Production will need to expand their offerings and services. To expand services, capital expenditures are necessary. Equipment needs range from laptops for students to check out from the SOURCE, to additional equipment to allow multiple graphic designers to work simultaneously. Appendix A outlines the proposed capital equipment and costs as well as annualized repair and replacement rates. The repair and replacement rates will be covered by operational budgets of the related SAF-funded entities. However, the Ad Hoc Committee recommends that \$171,000 is allocated to purchase equipment for SAF-funded entities that is necessary due to expanded services and the transition to the new Ohio Union.

VIII. Fee Level and Allocation

Given the charge of the Ad Hoc Committee, the process to assess the fee initially entailed an evaluation of the current funding levels and the possible expansion of the portfolio of SAF-funded programs. Initially the Ad Hoc Committee determined that the appropriateness of funding particular programs outside the context of the level of the fee was necessary to determine the appropriate level of funding for currently-funded SAF line items and possible new line items. The Ad Hoc Committee did have a discussion early in the process to address the goals of the SAF, students' expectations of SAF programming, the burden of fees on students, and the effect of inflation on the level of programming. These discussions set the tone of the Ad Hoc Committee to determine reasonable and efficient levels of funding for all SAF line items, even though the Ad Hoc Committee was not focusing directly on those items in the context of the SAF but in the context of generally limited funding. Furthermore, there was substantial discussion about inflationary erosion of the fee due to the failed recommendation to increase the fee since its implementation in 2003.

Once the Ad Hoc Committee determined the minimum level of need for each of the line items and the appropriateness of expanding the SAF portfolio, and inflation management, the Ad Hoc Committee recommends a \$10 increase per quarter for the SAF to \$25 per quarter. The Ad Hoc Committee also recommends a moratorium on another increase of the fee for a minimum of 4 years. Therefore, most students will see a maximum of 1 increase in the SAF during their tenure as a student. In addition, the increase accounts for past inflation, future inflation during the moratorium on a SAF increase, and some moderate program expansion. In addition, the Ad Hoc Committee recommends assessing the full fee to all students considered fulltime, regardless of credit hour enrollment.

After determining the needs of line items and appropriate portfolio expansion, the Ad Hoc Committee strongly recommends the following allocation of the SAF on an annual basis:

Fixed Costs (to be allocated first)	Amount
SOURCE	\$125,000
Graphics/Video	\$75,000
Staffing	\$300,000
Reconciliation	\$10,000
Total:	\$510,000
Variable Costs	
Ohio Union Activities Board	52.75%
Student Organizations	12.75%
Explore Columbus	15.00%
Student Governments	8.50%
USG	65%
CGS	25%
IPC	10%
Signature Events	7.00%
Alternative Breaks	4.00%

For FY2010, the Ad Hoc Committee also recommends an expenditure of \$171,000 for capital costs associated with SAF-funded entities caused by the transition from swing space to the new Ohio Union. This expenditure should first be covered by carry forward from FY2009 then treated as a fixed cost for FY2010. In the future, each line item has a sufficient budget to manage repair and replacement. See Appendix D for an illustrative allocation of the fee for FY09, FY10, and FY11.

IX. Carry-Forward Analysis and Recommendation

The Ad Hoc Committee reviewed the source of carry-forward funds and how those funds have been allocated in the past. The source of the carry-forward monies has exclusively come from the funds remaining in the Student Organization budget. The Ad Hoc Committee investigated the reasons for significant remaining funds in the student organization allocation. There was a strong consensus that a primary reason for the remaining funds is the reimbursement structure of paying for student organization-sponsored programming. Therefore, the Ad Hoc Committee has proposed a new process for funding student organization programs in section II of this report.

Historically, the carry forward funds have been allocated on an ad hoc basis by CSA or the CSA Allocations Committee. No formal structure existed for distribution of carry forward funds. The Ad Hoc Committee discussed the objective of the use of carry forward funds. The Ad Hoc Committee considered two objectives for distribution of carry forward funds: enhancement of current programming and investment in new ideas and innovative programming. Due to the current structure (and proposed continuation of that structure) that emphasizes continual support of successful and established programs and organizations, the Ad Hoc Committee recommends using the carry forward reallocation process to provide funds for new and innovative programming at OSU.

Requests for funds must be sponsored by a currently-funded program or organization. This requirement is designed to ensure proper stewardship and oversight of student fee dollars. The provision is not designed to stifle innovation, but to enhance joint programming and co-programming. Additionally, the Ad Hoc Committee created a standard timeframe and application requirements for funding. Once granted

funding, the sponsoring organizations must provide the proper post-event documentation as outlined in the Carry Forward Reallocation Process (Appendix E). The process is designed to standardize the process of reallocation of carry forward funds. Therefore, the Ad Hoc Committee recommends implementation of the Carry Forward Reallocation Process for FY10 or FY09, if there are sufficient funds remaining after reallocating carry forward funds to cover capital costs.

Appendix A: Capital Equipment

Area	Equipment Item	Purchase	Monthly	Annualized
SOURCE	28 Student Organization Office Computers*	28,000.00	1,396.50	16,758.00
	28 Student Organization Office Printers	5,600.00		
	Replace Color Poster Plotter Printer	2,500.00		
	BuckID reader/Register for SOURCE	5,000.00		
	Upgrade Paper Folding Machine	1,200.00		
	Replace Color Scanners	600.00		
	Upgrade equipment for Teams Kit/Retreats-to-Go box	1,000.00		
	Replace, increase stock of SOURCE videocameras	2,400.00		
	Replace, increase stock of SOURCE radios	800.00		
	Replace, increase stock of SOURCE bullhorns	400.00		
	Replace SOURCE popcorn machine	1,800.00		
	Wii, video game equipment to check out	1,500.00		
	Expand book and DVD collection for library	2,500.00		
	Snocone machine	900.00		
	Fax Machines for SOURCE, Info Desk	1,200.00		
	Safe for SOURCE	1,500.00		
	Flat panel TV screens for 2 org lodge meeting rooms	3,000.00		
10 Checkout Laptops	10,000.00	285.00	3,420.00	
		69,900.00	1,681.50	20,178.00
Explore Columbus	BuckID reader/Register for Explore Columbus	5,000.00		
	Ticket printer for Explore Columbus	1,000.00		
		6,000.00	0.00	0.00
Student Govt.	10 Student Government Office Computers	10,000.00	285.00	3,420.00
Video Editing	Video Editing Equipment	75,000.00		
Graphics	Graphics Equipment	10,000.00		
	Overall Total for SOURCE, EC and Stu Govt.	\$170,900.00	\$1,681.50	\$20,178.00

*5 existing in SOURCE + 16 in student orgs already and 28 new

Appendix B: Signature Events Allocation

Event	Prior Year Budget	Dept/Org	SAF Contribution	Dept./Org. Min.	** Min. Percent
African American Heritage Festival	\$44,902.08	MCC	\$20,000	\$14,000	30%
Best Day of Your Life	\$9,125.00	Staters	\$5,000	\$1,500	15%
Block "O" Watch Parties	\$7,432.00	Block "O"	\$5,000	\$5,000	50%
BuckeyeThon	\$23,542.75	BuckeyeThon	\$15,000	\$10,000	40%
Commencement Week	\$23,766.61	OU	\$15,000	\$7,000	30%
Community Commitment					
MLK Day of Service	\$23,871.98	OU	\$16,000	\$13,000	40%
International New Year's Eve Party	\$9,500.00	OIA	\$5,000	\$5,000	40%
La Fiesta	\$3,810.98	MCC	\$5,000	\$5,000	30%
PHC Spring Step Show	\$30,942.00	OU	\$20,000	\$11,000	30%
Thanksgiving	\$30,000.00	OMA/OIA	\$17,500	\$10,000	20%
MCEC	\$125,000.00	OU	\$70,000	\$30,000	30%
Taste of OSU	\$13,208.97	OIA	\$10,000	\$11,000	40%
Total:	\$345,102.37		\$203,500		
Recommended for Signature Events:			\$225,000		
Notes: 2007 number for New Year's included no publicity so number used was close to average of past 3 years + 2008 budget					
Step Show 2007 number due to host issue in 2008					
Taste of OSU has run closer to \$20,000 in the past					
**Minimum Percent applies only if minimum amount is less than the percent.					

Appendix C: Signature Events Policies

SAF Signature Events Funding Procedure

Requirements for Event Funding:

1. The planning committee for each event must be chaired by a student.
2. The chair must participate in event planning and leadership workshops and Signature Events Committee activities.
3. The advisor shall attend Signature Event Committee activities.
4. The student event chair along with the appropriate advisor(s) must provide interim reports on event planning and budget as requested by Ohio Union Council.
5. The student event chair must submit a report on the event to the Ohio Union Council within 30 days of the event or by the last Ohio Union Council meeting of spring quarter whichever time is earliest.
6. The sponsoring university department must committee a minimum amount of its departmental funds toward the event. The sponsoring university must establish a budget line exclusively for the signature event. If the sponsoring unit is a student organization, the student organization is responsible for raising a minimum amount of funding to support the program. The student organization shall work with the Ohio Union Business office to establish a university account for the Signature Event.
7. Funding Guidelines
 - a. SAF funds must be spent in compliance with the same spending guidelines as OUAB
 - b. Expenditure of SAF funds must be approved by the Signature Events Committee advisor
 - c. Expenditures of SAF funds must be processed through the Ohio Union Business Office
 - d. Interdepartmental transfers will be initiated only to clear an accounts receivable or to reimburse for prior expenditures by the other OSU department
 - e. No CSA Allocations funds may be requested for the SAF funded signature event
8. The event chair must agree to participate in a common marketing scheme for signature events through the Signature Events Committee but may also do additional promotion as is appropriate for the event.
9. The event must be clearly marketed to ALL students.
10. Admission charges for students shall be minimal.
11. Signature Events that exist primarily for the purpose of philanthropy shall be permitted to donate all proceeds from the event to the designated 501(c)(3).
12. Events that are not primarily philanthropic in nature may contain a philanthropic element in the program but revenue generated from participation costs charged to students may not be directly donated to a 501(c)(3).
13. Revenue from signature events whose primary purpose is not philanthropic:
 - a. Any revenue generated by a Signature Event shall be returned to the Signature Events funding line.
 - b. Any revenue generated by a Signature Event in excess of 5% shall be returned to the Signature Events funding line. Revenue equal to or less than 5% shall be retained in the event's university account for use on the subsequent year's program without affecting the SAF allocation or the sponsoring unit's financial commitment.
 - c. If all revenue generated is only from the general public (non-students), that revenue may be
 - i. Used at the discretion of the sponsoring unit.

ii. Donated to an approved 501(c)(3) serving Franklin County (Ohio).

14. SAF funds may not be used to pay University staff that support the event or serve the student organizers in an advisory capacity.

Management of Signature Events Funds and Program Quality:

1. The Ohio Union Council will review events annually focusing on both total budget income and expenditures and programming quality.
2. Ohio Union Council will provide guidelines for events addressing expectations and goals for programming and fiscal management.
3. The Ohio Union Council shall provide feedback and suggestions for programmatic and fiscal improvements.
4. The Ohio Union Council may reallocate unspent funds to be utilized within a current fiscal year.
5. Funds remaining at the end of the current fiscal year beyond 10% of the Signature Events Allocation will be moved into the carry forward fund managed by CSA. An appropriate reserve amount will be maintained for emergency circumstances of 1.5-2.0% of the total SAF Signature Events budget line.
6. The Ohio Union Council shall recommend funding for established signature events for a subsequent year to CSA prior to the last CSA meeting of spring quarter. Funding for any one event shall not be less than the maximum available for programs funded through CSA Allocations. The Ohio Union Council may recommend the removal of an event from the signature events SAF program due to financial or programmatic failure of the event.
7. Every three years, beginning in spring quarter 2012, Ohio Union Council shall issue a call for proposals for new events to be funded through the signature event line of the SAF. Ohio Union Council will recommend new programs and funding levels for new and existing events to be included in the signature event funding line prior to the last spring quarter meeting of CSA.
8. CSA shall have the final authority over designating an event a SAF Signature Event and the amount of funding for that event basing decisions on the best interest of the student body.

Appendix D: Allocation Illustration

Illustration of the SAF Fee Allocation from FY2009 to FY2011

	FY09	\$15 Fee	FY10	\$25 fee	FY11	\$25 fee	
Amount		\$2,303,000		\$3,750,000		\$3,750,000	
Fixed Costs							
Staff		\$0		\$300,000		\$300,000	
SOURCE		\$0		\$125,000		\$125,000	
Graphics/Video		\$0		\$75,000		\$75,000	
Reconciliation		\$0		\$10,000		\$10,000	
Capital Equipment Costs		\$0		\$171,000		\$0	
Total		\$0		\$681,000		\$510,000	
Remainder to Allocate		\$2,303,000		\$3,069,000		\$3,240,000	
OUAB		55%	\$1,266,650	52.75%	\$1,618,898	52.75%	\$1,709,100
Student Organizations		20%	\$454,900	12.75%	\$391,298	12.75%	\$413,100
Explore Columbus		12%	\$276,360	15%	\$460,350	15%	\$486,000
Student Governments (SG)		10%	\$236,000	8.5%	\$260,865	8.5%	\$275,400
Signature Events		0%	\$0	7%	\$214,830	7%	\$226,800
Alternative Breaks		3%	\$69,090	4.00%	\$122,760	4.00%	\$129,600
Total			\$2,303,000		\$3,069,000		\$3,240,000
		SG Breakdown		SG Breakdown		SG Breakdown	
USG		70%	\$165,200	65%	\$169,562	65%	\$179,010
CGS		20%	\$47,200	25%	\$65,216	25%	\$68,850
IPC		10%	\$23,600	10%	\$26,087	10%	\$27,540

Appendix E: Carry-Forward Policies

Carry Forward Reallocation Process

Purpose of the Student Activity Fee: Programs supported by Student Activity Fee [hereinafter SAF] dollars should be primarily facilitated by students for the benefit of students. The SAF should support the diverse interests and backgrounds of its student community. SAF funded programs and events should enhance the student experience at Ohio State.

Initial Condition: If a minimum amount of \$25,000 of SAF funds is available for reallocation from the prior fiscal year.

Timeline:

1. By October 1, the Council on Student Affairs will determine if there is a need for carry forward reallocation, i.e., the initial condition is met, and the total amount of funds available for allocation based on the funds remaining in the SAF budget lines.
2. In the event of an affirmative decision, CSA will notify appropriate parties of the date of application deadline and the total amount of funds to be allocated.
3. The deadline for applications will be the fifth Friday of autumn quarter.
4. The CSA Allocations Committee will notify applicants of their decision by the last day of autumn quarter.

Application Requirements:

1. The request for funding must be sponsored by a SAF directly funded program or organization.⁴
2. The event or program for which funding is requested must be for one-time funds, e.g. a pilot program, a new, innovative event or program, or an unconventional event or program.
3. A proposal must be submitted by the fifth Friday of autumn quarter.
4. The proposal must include the following (in order):
 - a. Explanation of the program
 - b. Explanation of how the program supports the purpose of the SAF
 - c. Why the program is unique and innovative
 - d. Your criteria for program success including estimated number of participants and estimated number of student participants
 - e. Marketing Plan
 - f. Total Itemized Budget with an explanation of expenses
 - g. Itemized Request for carry forward funds from Total Itemized Budget
 - h. Other sources of funding and contingency plan if funds are not awarded by CSA Allocations
5. Requests must not exceed the total amount of funds available for allocation.
6. Any co-sponsoring organization, department, or individual must be in good standing with the University.
7. Events/Programs may not include religious or worship services, political or lobbying activities, or gambling as defined by the CSA Allocations Guidelines.
8. Presentation on proposal if requested by CSA Allocations

⁴ Currently, OUAB, CGS, IPC, USG, Explore Columbus, Alternative Spring Break, the SOURCE, or Graphics.

9. CSA Allocations may request additional information and clarification; sponsors must respond within 7 days.
10. Failure to meet the application requirements may result in disqualification of the proposal.

Fundable Expenses (all expenses must comply with OSU purchasing policies):

1. Presenter/performer fees
2. Travel expenses per OSU Travel Policies
3. OSU facility charges or other facility charges if justified
4. Tickets
5. The following from OSU or OSU approved vendors:
 - a. Publicity
 - b. Security and safety
 - c. Awards
 - d. Food and beverages
 - e. Consumable supplies
 - f. Equipment rental
 - g. Other expenses
6. Labor fees associated with equipment and facility rentals

Evaluation Priorities:

- Value of the event as it relates to the spirit of the fee
- Uniqueness of the proposal
- Impact on students
- Demonstration that sponsoring organizations will be able to successfully execute the event
- Overall Appropriateness of Budget
- Compliance with the application requirements

Post Event Requirements:

After the event, the sponsors must provide the following to CSA Allocations (failure to do so will result in disqualification to participate in the process for three calendar years):

1. Program Assessment Report⁵ within 30 days after the event
2. Audit Verification⁶ approved by CSA Accountant
3. Presentation about the event to CSA Allocations and/or CSA if requested

⁵ To be created.

⁶ To be created.

Appendix F: Ad Hoc Committee Information

CSA Ad-hoc Committee for the Review of the Student Activity Fee CHARTER

- I. Purpose
 - a. The Purpose of this Ad-hoc Committee is to review the Student Activity Fee, evaluating the following:
 - i. Review/Verify report from previous Ad-hoc committee
 - ii. New Union Services (SOURCE)
 - iii. Major Campus Event funding (monitoring new recipients)
 - iv. Methods in which carry forward money is spent.
 - v. Methods in which regional campus students are involved
 - b. The Committee shall establish recommendations to the Vice President for Student Life for implementation in fall of 2009.
- II. Committee Membership
 - a. The Ad-hoc Committee shall consist of fourteen (14) members, with nine (9) voting members, including:
 - i. The Chair, as appointed by the Chair for the Council on Student Affairs
 - ii. Two (2) representatives from Student Affairs, as non-voting members
 - iii. Two (2) representatives from the Ohio Union
 - iv. The Chair for the Council on Student Affairs, as a non-voting member
 - v. The President of each of the three student governments, or designee
 - vi. One (1) additional representative from each of the three student governments, as appointed by their respected Presidents
 - vii. One (1) faculty representative
 - viii. The CSA Fiscal Coordinator, as a non-voting member
- III. The Chairperson
 - a. Shall be appointed by the Chair for the Council on Student Affairs
 - b. Shall solicit proposals from all Student Affairs entities that wish to be considered for funding through the fee
 - c. Must set a date/time for each meeting and arrange a place to the meeting to be held
 - d. Must create an agenda for each meeting, or reasonably plan each meeting accordingly
 - e. Shall preside over each meeting or have a suitable substitute in the case of an absence
 - f. Shall be responsible for taking minutes for each meeting
 - g. Must deliver the final report of the Committee to the Director of the Ohio Union, Vice President for Student Life, and the Council on Student Affairs
- IV. Meetings
 - a. The Committee tentatively hold meetings for the following purposes:
 - i. Team building; Educate members about the fee
 - ii. Hear financial reports from entities that already receive portions of the fee
 - iii. Read proposals from other entities that wish to be allocated a portion of the fee
 - iv. Hear reports from a selected group of those proposals