

## SAF Annual Proposal Form for the 2016- 2017 Academic Year

The SAF Committee will be accepting applications for the annual budgeting cycle from November 30, 2015 until 5:00pm on January 14th, 2016. 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 2016 to 2017 academic year.

A member of your group must be available to attend a hearing with the SAF Committee tentatively scheduled for Friday, February 5, 2016 and February 12, 2016. 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. If the dates change, groups will be given 10 business days' notice.

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 1, 2016 and April 8, 2016. Requesting groups will be notified of a preliminary budget before the open forum and appeals date.

**This is a two part-application. Please complete both this document and the funding excel spreadsheet and submit to the Dropbox by 5pm on January 14, 2016. Only applications that have submitted both documents by the deadline will be considered complete.**

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.

\* Indicates a required field

## SAF Annual Proposal Form

### Proposing Group\*

(E.g. Career Center, Sustainability Club, Social Justice Organizers, etc.)

Beta Alpha Psi – Mu Psi Chapter

### Department/Organization\*

(E.g. Student Affairs, Library Services, Recreation and Wellness, Student Clubs, etc.)

Student Clubs

### 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.

Travis Takeuchi

### Contact Email\*

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

Travistakeuchi.bap@gmail.com

### Contact Phone\*

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.

206-790-2313

### Faculty/Staff Member\*

Discuss your request with a staff or faculty member (i.e. Student Engagement and Activities staff or faculty advisor) before submitting your request and include the name and title (i.e. John Smith, Club Advisor) of that individual. This person will also be listed as the budget owner.

Deborah Medlar, Club Advisor

**Faculty/Staff Member Email\***

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

medlard@uw.edu

**Executive Summary of Your Proposal\***

Provide a concise overview of the program, activity, or service for which you seek funding. Explain how your proposal supports UW Bothell's 21st Century Initiatives. Reference the University of Washington Bothell's 21st Century Initiatives at the following website and, if and where appropriate, refer to the applicable initiatives: <http://www.uwb.edu/21stcentury>

BAP is an international student organization and our chapter is one of the 300 plus chapters. The organization enriches the learning of UWB students pursuing an accounting focused career. Our annual BAP schedule consists of events and meetings that work towards helping our students. Our activities and goals further the 21<sup>st</sup> Century Campus Initiative in many areas.

We need funding this year for numerous activities and events:

- Regional Conference – sending 12 officers who will also compete
- National Conference – sending 4 officers who will present or compete
- Meet the Firms
- Spring Banquet

The overall purposes of the club are very much in tune with UWB's 21<sup>st</sup> Century Campus Initiative in the following ways.

- 1) Collaboration with a broad range of community partners in addressing workforce needs. The partners help us learn more about the opportunities available for those who are pursuing accounting degrees
- 2) STUDENT CENTERED – our organization is run by its officers and a 3 student executive committee. The officers use frequent surveys to determine the needs and desires of both the students and the business community. ALL of our meetings and services are designed to ensure some type of growth opportunity for students.
- 3) GROWTH, COMMUNITY and RESOURCEFULNESS: We were initially involved with only 2 public accounting firms. 5 years after formation, we work with 14 public accounting firms, with faculty, career services, to develop soft skills which help budding professionals in the work environment. This builds institutional sustainability through use of our human resources.
- 4) DIVERSITY: One of our constant goals is to learn to network and develop lifelong

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friendships and networks with each other as well as business professionals locally and at national Conferences. 4 of the last 5 years we have entered the BAP national diversity competition. Our projects have involved increasing and smoothing interactions with and between

- a) Veterans, the Muslim Community,
- b) Traditional students and older non-traditional students
- c) International students and domestic students. This year we have dedicated our international etiquette dinner and Chinese-to-American business interaction workshop to helping international and domestic students alike learn about the diverse cultures/perspectives present.

4) COMMUNITY: Contribute to the community with significant service contribution requirements – all of which are tied to existing community volunteer organizations. This enables our students to value volunteer service establish personal and long term personal volunteer practices.

Our weekly workshops help supplement the learning done through academic courses. We make sure that we look at the current needs of our students based on feedback from members of the previous year. We also provide multiple opportunities for our students to practice their communication and networking skills, which are a vital skill for any aspiring professional. Specifically, our 23 meetings and numerous service events:

- 1) Host a number of professional organizations which are always looking to speak with students about the possibilities of following an accounting focused career.
- 2) Include 12 soft skill training meetings, and 1 informational meeting about CPAs, and one solely networking event and 7 “professional organization” presentations.
- 3) Are open to all majors; but, repeat attendance at our -7 “professional” meetings does require an application to be submitted to become a candidate for Beta Alpha Psi.

We do our best to encourage students of all majors to attend our soft skills workshops as they benefit the general working professional.

#### REGIONAL AND NATIONAL MEETINGS

Attendance at the regional meetings and annual conference are so informative that faculty advisors make them mandatory for at least some of the officers. The conferences have multiple simultaneous sessions about running and improving the organization. In addition there are presentations from professionals with national organizations. Officers come back from these events with numerous ideas that have succeeded for other chapters.

Our annual BAP schedule consists of events and meetings that work towards helping our students learn more about the opportunities available for those who are pursuing accounting degrees as well as the soft skills that help professionals in the work environment. We function as an arm of a larger national organization which enriches the growth of UWB students pursuing an accounting focused career. Our workshops help supplement the learning done through the courses and we make sure that we look at the current needs of our students based on feedback from members of the previous year. A number of our events also target the students of our campus coming from foreign countries as our chapter goals also include being inclusive. We have dedicated our international etiquette dinner and Chinese-to-American business interaction workshop to helping international and domestic students alike learn about the diverse cultures/perspectives present. We also give multiple chances for our students to practice their communication and networking skills, which are a vital skill for any aspiring professional. Our events host a number of professional organizations which are always looking to speak with students about the possibilities of following an accounting focused career. Nearly all of our events are open to all majors, while certain weekly meetings do at least require an application to be submitted to become a candidate for Beta Alpha Psi. We do our best to encourage students of all majors to attend our soft skills workshops as they benefit the general working professional.

#### **Need for this Program/Service\***

In 200 words or less:

- Describe the need for this program or service. Explicitly describe how the program directly and/or indirectly benefits the UW Bothell campus community.
- Include any data that might support your proposal (e.g. surveys indicating a need for your initiative).
- If you have tracked the success of this program or service in the past, provide that information here.

Beta Alpha Psi's international etiquette dinner and Chinese-to-American business interaction workshop allow the students to hear the experiences and accounts of professionals who have worked internationally. As a smaller campus still in the growth process, opportunities to learn about the international business perspective/experience are limited. Our programs bring the professionals to the students. The chance to learn from the insight provided from a successful professional allows the students to see where the theory ends and experience and critical thinking become crucial to finding success. The difference in environment and straight forward relation to the work experience stem away from the theory that students typically learn in their courses.

Our Meet the Firms and Spring Banquet events are our biggest events, easily with bringing in roughly Historically attended by 70-80 students/professionals each, which give the students multiple hours to network with multiple accounting firms and CPA review course representatives as to the specifics of the accounting career path. Through these events, our students are able to learn more about what it is like to work in public accounting or to work as a staff accountant and how they can prepare for the professional workplace.

THIRD ANNUAL MEET THE FIRMS: Members of 12 accounting firms and state employers attended last year and each firm saw 28 students. The accounting firm members were seated at tables, and students moved around in groups to each table, spending 12 minutes at each table.

For most students this is the first significant conversation with a member of a public accounting firm. The vast majority of the

Sstudents are nervous and very often awkward about making conversation. The firm members help the students learn to relax, make conversation and become comfortable in a professional environment. In addition, students comment that they keep the connections they make with the professionals at this event. Several used the professionals as mentors and/or were eventually hired by the firms involved.

Firm members have reported that they LOVE this event, because nowhere else do they get a chance to talk to so many students at one time.

SPRING BANQUET- a celebration: All accounting majors are invited to this event. Students are seated with professionals. The event is highlighted by a keynote professional speaker. Annual awards for accounting students, students and BAP initiation also occur at this event.

This event benefits students, but is something that every university in Oregon, Washington and Idaho also engage in. To be considered as a peer program, we need to have a fun and professional looking event. So, we throw our souls into making this event the best possible. We already have a speaker for this spring's event.

**Estimate number of students that will benefit from your proposed program/service\***

In 200 words or less:

- 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.

As previously stated, this program will help bring an international perspective to business interactions and provide a place where our students can ask any burning questions they may have. As UWB students are the future business leaders, dinner etiquette and how one should conduct oneself in a foreign country or in company of someone from abroad will eventually become a real concern. Though small, our annual international etiquette dinner and international business workshop will benefit at least 100 UWB students, both member and non-members of Beta Alpha Psi.

We estimate our Meet the Firms and Spring Banquet to each bring in roughly 75-85 UWB students. As previously stated above, our events connect our students with accounting professionals who are more than happy to inform future business leaders about what they can expect entering the accounting industry. The norm for these events is that students the professionals will establish a connection with our students and make time outside of our events to inform them about what to expect on the path to becoming a public accountant working to become partner or a controller/CFO.

75 accounting firm members and government employees benefit. In addition, approximately 20 students from Community Colleges who are interested in UWB attend the Spring banquet.

**Assessment plan for the program or service\***

- How do you plan to track the effects of this program or service?
- How would you track how successful it was and what you could change in the future?
- If needed, include any other information you feel is relevant to your request.

Following both events, we plan to ask attendees to fill out review forms of what they felt about the event and how it could be improved. For the international etiquette dinner, email ~~review~~ forms review surveys will need to be sent out.

For the international business interaction workshop, we will use paper sheets as we feel that a classroom setting will be a bit easier to hand out and pick up the forms.

**Salaries/Wages**

Describe the funds you are requesting in detail below including: number of positions, hours per week, position title, salary, etc. Explain any differences or distinctions in positions. Benefits will be calculated on the spreadsheet, as appropriate. Put total dollar amount of salaries/wages in the bottom of this box and on the spreadsheet.

No wages or salary requested

**Programming/Events**

Describe the funds you are requesting in detail below, including: costs relating to security, honorarium, hospitality, and contracted costs, etc. Put total dollar amount of programming/events in the bottom of this box and on the spreadsheet.

**Facilities Rentals/Set-Ups**

Describe the funds you are requesting in detail below including: facilities rentals/set-ups, custodial fees and clean up. Put total dollar amount of facilities in the bottom of this box and on the spreadsheet.

All of our events are in NCEC, and unless something changes there are no fees.

**Printing & Photocopying**

Describe the funds you are requesting in detail below. Put total dollar amount of printing/photocopying in the bottom of this box and on the spreadsheet.

Printing of Large posters at Costco for Meet the Firms and Spring Banquet - \$30  
Photocopying Posters for other events - \$42

### Office Supplies

Describe the funds you are requesting in detail below. Put total dollar amount of office supplies in the bottom of this box and on the spreadsheet.

- Beta Alpha Psi branded pens (\$240)
  - Rate: \$0.75
  - Quantity: 300
  - Estimated shipping \$15.00
- Beta Alpha Psi branded shirts (~~\$200~~600)
  - Estimated rate: \$20.00
  - Quantity: ~~10~~30

### Food/Refreshments

Describe the funds you are requesting in detail. 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>

Put total dollar amount of food refreshments in the bottom of this box and on the spreadsheet.

- ~~Food/Refreshments for International Etiquette Dinner (\$1,500.00)~~
  - ~~Buffet style food~~
  - ~~Expected cost/attendee (\$15.00)~~
  - ~~Expected attendees (100)~~
- Food/Refreshments for Meet the Firms
  - Water, Soda, Fruits, Sandwiches
  - Previous year estimate:
    - Expected cost/attendee (~~\$12~~10.00)
    - Expected attendees (~~80~~160)
- Food/Refreshments for Spring Banquet
  - Catered food
  - Previous year estimate cost:
    - \$2,500.00

### Equipment Rentals/Purchase

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.

Put the total dollar amount of equipment rentals/purchase in the bottom of this box and on the spreadsheet.

### Transportation

Describe the funds you are requesting in detail below including: in state or out of state, justification for out of state travel and type of transportation. Note: flight booking is managed through the University. Put total dollar amount of transportation in the bottom of this box and on the spreadsheet.

We are requesting funds for:

- ~~Travel fees for guest speaker for International Etiquette Dinner (\$500)~~
  - ~~Out of state~~
  - ~~Flight~~
  - ~~Professional experienced in international business~~
- Travel fees to bring executive team to National Conference (Baltimore) (\$2,000)
  - Estimated 4 executive team officers
  - Requesting max \$500.00 per student
- Travel fees to bring officer team to regional conference (SpokanePortland) (\$500)
  - Estimated 4 cars

### Meals and Lodging for Travel

Describe the funds you are requesting in detail below. Ensure that you are in compliance with applicable per diem rates for meals. The rates are available at them following link: <http://www.gsa.gov/portal/category/21287>

Note: hotel bookings are typically managed through the University. Put the total dollar amount of meals and lodging in the bottom of this box and on the spreadsheet.

- ~~Lodging fees for guest speaker for International Etiquette Dinner (\$200)~~
  - ~~Length of stay: 2 days, 1 night~~
- ~~Meals for guest speaker for International Etiquette Dinner (\$100)~~
- Lodging for Regional Conference (\$560720)
  - Rough estimate for stay (\$500660)
  - Rough estimate for parking (\$60)
- Lodging for National Conference (\$650975)
  - Based on estimated last year amount

**Operations**

Describe the funds you are requesting in detail below. Put the total dollar amount of telecommunications, business cards, computer purchases, equipment, new hire packages, etc. in the bottom of this box and on the spreadsheet. Phone lines should be calculated at \$10 per line per month.

<http://www.washington.edu/itconnect/service/telephones-and-voicemail-services/>

**Other**

Include any other expenses that do not fall under any of the above categories, in detail. Put the total dollar amount of other in the bottom of this box and on the spreadsheet.

- National Conference Registration (\$1000)
  - Estimated 4 executive team to send
  - Previous year cost/attendee (\$250)
- Regional Conference Registration (\$1000)
  - Estimated 10-12 officers to send
  - Previous year cost/attendee (early bird special) (\$10085)

**Total Amount Requested\***

List your total amount requested, using the total from the spreadsheet.

\$11,710,227

**Terms and Conditions\***

By submitting this application, you are agreeing to the terms and conditions below:

- 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 5, 2016 and Friday, February 12, 2016. Someone from my group will be available to attend a brief hearing scheduled during that time frame.