

# Funding

## Funding models for clubs and societies

This resource will help you to think about how you allocate grant funding to your clubs and societies. It will help you to consider the make-up of the grant allocation committee, the application process, and the terms and conditions of grant funding.

### Introduction

In many students' union there is an allocated pot of money available for grants for societies and/or clubs. The amount available varies greatly between different students' union, and also sometimes between different groups within the same students' union.

There is no consistent model across students' unions that is used for allocating grant funding. Additionally there isn't a specific model for grant funding that NUS recommends. However it is encouraged that your model is open, accessible, fair and democratic. Consider any new processes that you introduce to ensure that it is the most efficient method for students, staff and elected officers.

### The grant-allocation committee

To ensure a fair and democratic allocation procedure it is a good idea to have a committee, or at least more than one person making the decision.

To create your grant-allocation committee you should consider:

- Will there be a staff presence on the committee?  
It may be a good idea to include a member of staff who works directly with clubs/societies and perhaps someone

from the finance team of your students' union.

- Will there be student representation on the committee, apart from the sabbatical officer?
- Who will chair the committee?
- How often will the committee meet?

It is probably more efficient to pre-plan these meetings and promote the dates to the groups applying for funding so that they can then ensure they submit applications in time.

- How will voting in the committee meetings work?

Does each committee member get equal vote? Will you vote on all decisions or just difficult ones?

- What will the committee be called?

An alternative to a committee could be to decide on grant funding through a forum of all club/society committees.

## The application process

Consider how you can make the application process straightforward for committees whilst still ensuring the relevant information is collected.

Answering the following questions should help you to identify what needs to be included in your application process.

- When will applications need to be submitted?
  - One opportunity as part of strategic planning for club/society committees
  - Throughout the year, whenever they need funding
  - Throughout the year at specific dates
  - Once per term
- What format will the application be?
  - Online
  - Downloadable form, emailed to committee
  - Paper form
  - Combination of above
- What specific information do you need to make a decision?
  - Name of club/society and contact details
  - Current funds
  - Details about funded activity
- Could you combine this process with another?
  - Registration
  - Development planning
  - Event planning
  - Health & safety

## Other things to consider

- Make it clear about the terms and conditions of funding. For example if you can't fund events with alcohol, state this on the application form and explain this when you speak to committees.
- Ensure that the key dates and deadlines are considered carefully and justifiable. If you can't justify a deadline then why is it in place?
- Ensure all key dates and deadlines are promoted and explained.
- Offer a right to appeal a decision afterwards.

## Contents

This inspiration sheet contains content from:

- University of Leicester Students' Union
- Liverpool Students' Union
- Nottingham Trent University Students' Union

If you have any questions about this guide or would like to suggest any amends please contact [rosie.hunnam@nus.org.uk](mailto:rosie.hunnam@nus.org.uk).

# University of Leicester Students' Union

## About

This resource explains the implementation of a new Outcomes Based Grant Funding Model for all societies and associations at the University of Leicester Students' Union.

## The idea

This new funding process is a very exciting step towards providing the necessary financial support to those Societies and Associations who are fully engaging with their membership (and beyond) to provide the students' at the University of Leicester Students' Union with an exceptional experience.

When applying for funding, groups need to inform us of what they intend to do as a Student Group (events/activities/support/development) and who it will benefit (their members or the wider student community).

Each year there will be key targets set out, which we would like to encourage the Student Groups to aim for when organising an activity that might require additional funding from the SU.

Previously, the Students' Union allocated some grant funding to be distributed amongst our affiliated Student Groups without any real direction or reasons why.

Whilst we recognise some student groups require financial assistance to continue to offer their members an exceptional experience, this money should not be solely relied on or expected. All Student Groups need to show that they are able to run on their own two feet

without financial support from the Students' Union.

One of the main issues with how grant funding was allocated in the past, was that not all groups who were successfully awarded funding spent their allocation in full. This means that this allocated money has not been used wisely, and could have gone to another student group to help benefit their activities.

The purpose of this new funding model is to help support our affiliated Student Groups with the running, development and events of each Student Group but with a much more focused approach. The money goes to those who need it rather than those who feel they are entitled to it.

## Development stages

Discussions were had between staff and the student sabbaticals before we implemented the idea. We also asked for feedback from all student groups of which all was positive.

We looked at a similar process run at Boston University in the USA and took some ideas from them. We also looked at the previous 3 year's grant spending patterns of our societies and that's when we realised that money wasn't being spent even though they had been allocated it.

## Indicators of success

It is currently in the very early stages, so it's difficult to quantify its success/failure at the moment.

We have had a very good reaction from the student groups to the new model and we fully allocated our October pot to those groups that applied through the new system.

We will review the model and the processes in the summer, discuss with the student groups what worked and what didn't and make any necessary changes then.

### Further information

There is an explanation of this funding model on this [website](#).

For more information about this, please contact [Ian Read](#) or [Kerri Wheeler](#) at the University of Leicester Students' Union.



# University of Liverpool Students' Union

## About

This resource explains the sports and society funding at Liverpool Students' Union. It includes how the union determine who gets higher rate sports funding and explains how they have created a transparent democratic system.

Included in this case study is:

- Funding Allocation Process
- Student Group Funding Application Pack
- Student Group Funding Application Pack – Level 4

## The idea

We had a historical method which assigned "BUCS" and non BUCS activities based on whether they were long established sports. "BUCS" sports received full funding whilst "non BUCS" received only access to our club and societies' grant pot. This system offered no flexibility for newly developed teams who competed in BUCS, or had higher costs, and encouraged complacency and a sense of entitlement amongst long standing teams regardless of their performance or size.

We created a new democratic model which assigns funding every year based on set criteria and allows students to make the tough decisions about who should receive funding.

## Development stages

We looked at different criteria from various unions and proposed several papers to club

captains and our 'Better Union' forum to ensure student group buy-in.

After 2 years this is now fairly established and is working well. We now offer 4 levels of funding allowing us to cater to most societies' needs, as well as control costs in the department. It also gives us lots of society impact stories and case studies.

## Indicators of success

There have been many benefits from creating this system; decisions are made by students so there's a greater sense of fairness and improved understanding of where the money goes. Also, it's easier for departmental budgeting, particularly when budgets are restricted.

## Further information

If another students' union is developing a similar grant funding scheme it important to ensure that:

- you are clear about what the forms are being scored on
- clubs complete their budgets and follow through with their budget
- clubs are warned when their funding allocation is getting low
- clubs fully understand the process

It is also advised that the process is quite admin intensive, so beware of the impact on staff time. Ensure that the decision-making is spread over a number of meetings rather than just a couple as such meetings can be quite lengthy.

Finally, be aware that it is harder to make savings midway through the year so ensure that you accurately forecast spending at the start of the year.

For more information about this, please contact [Sally Senior](#), Union Experience Manager at the University of Liverpool Students' Union.



## **LiverpoolSU Funding level allocation process:**

LiverpoolSU operates a democratic funding process for all clubs and societies. Student groups need to apply each year for the level of funding they wish to receive in the following academic year.

### **The funding levels available are:**

1. Level 1: Union membership fee £45, Levels funding £3400
2. Level 2: Union membership fee £15, Levels funding £1100, some access to grant pot
3. Level 3: Union membership fee £5, Levels funding £0, full access to the grant pot.
4. Level 4: Union membership fee £0, apply through trustees for funding, must demonstrate how they meet the level 4 criteria.

If you wish to apply for levels 1 or 2 you MUST submit the "student group funding application pack – level 1 & 2" paperwork to LiverpoolSU reception, where you will receive a receipt, by 11<sup>th</sup> March 2013.

If you wish to apply for level 4 you MUST submit the "student group funding application pack – level 4" paperwork to LiverpoolSU reception, where you will receive a receipt, by 11<sup>th</sup> March 2013.

If you wish to be funded at level 3, you do not need to take any action. Applications are judged by the student funding committee, who are elected by Better Union Forum on 7<sup>th</sup> March. The committee consists of two representatives from societies currently funded at each level, a maximum of 8 students, as well as the Union Experience Manager and the Vice President Activities.

If you need help, advice or support in completing your funding paperwork please contact Sally Senior, Tom Aldus or Laura Outten who will be happy to help.

### **Applications are scored against 7 criteria:**

1. Members (more members and lower cost per head means a higher score)
2. Money (if your budget demonstrates a need for the funding, and your group making an effort to contribute to its own costs this will mean a higher score)
3. Development Plan (a strong development plan showing how your group has improved and will continue to do so will mean a higher score)
4. Support for LiverpoolSU (increased support for LiverpoolSU will mean a higher score)
- 5.

6. Elite (if you are able to demonstrate that your group is elite, and therefore extremely good at what it does, this will mean a higher score)
7. Health and safety and inclusivity (if you can demonstrate you follow LiverpoolSU policy and processes and prioritise these, this will mean a higher score)
8. Sell it to us (a more persuasive argument will mean a higher score)

**Stages of the funding committee process:**

1. Funding committee are elected and funding paperwork is distributed.
2. Deadline for submission of completed funding paperwork to the committee.
3. Completed funding paperwork is fact checked and sent out to funding committee.
4. Funding committee score each application out of 70, 10 points for each section.
5. Funding committee are given an indication of how many
- 6.
- 7.

clubs are likely to be supported at each level in the 2013-14 budget.

8. Funding committee meets to discuss how they have ranked all level 1 applications, and agree a priority list for level 1 funding next year. Unsuccessful level 1 applications are passed into the level 2 group for consideration.
9. Funding committee meets to discuss how they have ranked all level 2 applications, and agree a priority list for level 2 funding next year.
10. Funding committee meet to discuss all level 4 applications. Group also discuss preferences on what should happen if less levels funding is available.
11. LiverpoolSU 2013-14 budget is set and approved for next year. Number of clubs possible to support at each level confirmed.
12. Funding committee priority rankings and what if discussions used to select funding level offered to each group. Student groups informed.





## Student Group Funding Application Pack

Club Name: \_\_\_\_\_

What funding level are you applying for? \_\_\_\_\_ Current funding level \_\_\_\_\_

No. of paid/registered members currently \_\_\_\_\_

### **MEMBERS**

Expected members next year \_\_\_\_\_ if a big change why? \_\_\_\_\_

Cost per head to LiverpoolSU \_\_\_\_\_

**Members Score out of 10** \_\_\_\_\_



### **Money**

Main income and expenses last year			
Income		Expenditure	
Source	How much	Item	How much

Predicted income and expenses for coming year			
Income		Expenditure	
Source	How much	Item	How much

If you are applying for Level 2 or 3 do you plan to apply for a grant?



Yes  No

If you are applying for Level 4 do you plan to apply to Trustee Board for money?

Yes  No

## Fundraising

What fundraising has your club done in the last year?

*Continue on a separate sheet if necessary*

What fundraising does your club plan to do next year?

*Continue on a separate sheet if necessary*



How do your members contribute to the costs of participating in your club?

*Continue on a separate sheet if necessary*

**MONEY Score out of 10**

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## **Development Plan**

Where was your club a year ago? Tell us all the information about where your club was this time last year. This can include members, finances, division, points, activities, events and specific achievements and downfalls.

*Continue on a separate sheet if necessary*



Where do you want to be in 6 months? This can include members, finance, division, points, activities, events and specific achievements.

*Continue on a separate sheet if necessary*

Where do you want to be in a year? This can include members, finance, division, points, activities, events and specific achievements.

*Continue on a separate sheet if necessary*



What 5 steps will you put in place to achieve this?

1.
2.
3.
4.
5.

What non-financial support can LSU offer you to help you to achieve your goals?

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How have you done against your development plan from last year? What goals have you met?

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Have you recruited your incoming committee and passed their details to LiverpoolSU? YES/NO

Have you discussed your development plan with your incoming committee?

YES/ NO

Development plan score \_\_\_\_\_



## **How do you support LiverpoolSU?**

Feel free to use these questions as guidance and if this doesn't accurately describe your commitment to LiverpoolSU then tell us more in the box at the bottom.

**Which Forums have members of your club attended this year? -**  
(please circle)

October	November	February	March
Better Union	Better Union	Better Union	Better Union
Better University	Better University	Better University	Better University
Better City	Better City	Better City	Better City
			Liverpool Futures

**How many club captains events have you attended? (please circle)**

March 2012 training	7 <sup>th</sup> Sept 2012 training	Nov club captains	6 <sup>th</sup> Dec club captains	Feb/March club captains
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**How regularly do you contact LiverpoolSU to update us on your activity?**

Several times a week  Once a week  Once a fortnight

Once a month  Once a term  Once a year  Never



**How many events have you organised in the Haigh Building this year?**

0  1 or 2  3 – 5  5+

**How many socials have you held in LiverpoolSU this year?**

0  1 or 2  3 – 5  5-10  10+

**Has your club done any work in the community this year?**

None  Once  Sometimes  Regularly

**Has your club collaborated with other student groups this year?**

Never  Once  Sometimes  Regularly

**Has your club supported a university course at all this year?**

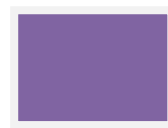
If yes give details in the 'anything else' box.

Yes  No

**Anything Else??**

*Continue on a separate sheet if necessary*

**Support for LiverpoolSU Score**



## **Elite**

Is your club performing at an elite level? YES/NO

What awards/competitions have you won that would demonstrate this?

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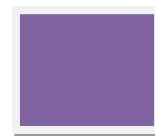
If you are a BUCS sport where did you place in the league and competitions?

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Anything else that demonstrates the high quality performance of your group?

## **Elite Score**



## **Health and Safety**

Are you high risk, medium risk or low risk? \_\_\_\_\_

Do you have an up to date risk assessment for your socials, transport and main activity? YES/NO

Have you done any one off events this year? YES/NO

If yes, have you completed a risk assessment? YES/NO

Have you completed & handed in passenger lists before using any transport? YES/NO





How can you demonstrate your commitment to running safe activities?

How do you make your activities inclusive?

Health and safety/inclusivity score



## **Sell it to us**

Why does your club deserve to be in this funding level?

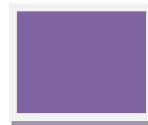
*Continue on a separate sheet if necessary*

How will it help the club to achieve its goals?

*Continue on a separate sheet if necessary*



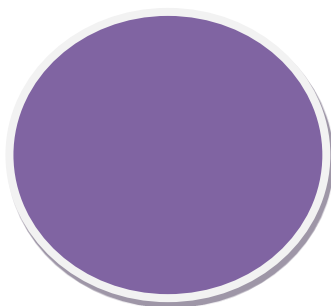
**Sell it to us score**



**TOTAL SCORE OUT OF 70**



**Level allocated**



## Student Group Funding Application Pack – for Level 4

Level Four student groups are defined as groups which offer a unique support or representative service, and fill an important role in JMU students' lives beyond the provision of social activities.

This can be further broken down into three main types of group:

### **Liberation**

A group that is seeking the equal status or just treatment for or on behalf of historically under represented or disadvantaged groups, for example groups supporting BME, LGBT, Women, and/or Disabled students. There is an expectation that the committee members of these clubs will attend NUS conferences and training throughout the year, as well as supporting the union delegate and network.

### **Academic**

A group that represent specific students at a course, school or faculty level. There is an expectation that the group will share any issues from within the course to either the student voice coordinators or student voice support assistants within LiverpoolSU; and that the group members will be made aware of the support that is available to them through the students union when dealing with academic issues. There is also an expectation that the committee of these societies will take part in the union's course representation scheme, attending training and fulfilling roles as necessary.

### **Union standing societies**

These are societies which LiverpoolSU officers and the funding committee believe it is important that LiverpoolSU supports in order to enhance the student experience of LJMU students and which build on the work of LiverpoolSU. There is an expectation that they will work closely with LiverpoolSU in our day to day activities, and provide some additional benefit to the union which other groups cannot provide. Examples of standing societies might be Looprevil Press as a student newspaper promoting LiverpoolSU activity and student engagement, and RAG supporting other student groups fundraising.

Level 4 clubs do not have to pay any membership fee and any that they charge their members goes directly into their accounts. They will not have access to the grant pot and will not receive any direct levels funding, but instead they can apply directly to the trustee board for any funding they require. Level 4 groups are encouraged to make these applications in

February and March where possible to ensure their requirements are budgeted for. They should liaise with the VP Activities to arrange this. The VP Activities can present on their behalf at a board meeting or a special representative committee can be called to make the decision on the boards behalf, is recommended this consists of a sabbatical officer, a student trustee and a community trustee and the chief executive.

Level 4 groups will continue to receive staff support, the ability to book rooms in LiverpoolSU and the University, and training and development for their committee.

Club Name: \_\_\_\_\_

Which type of level 4 group do you believe you are? \_\_\_\_\_

Do you plan to apply to Trustee Board for money?

Yes  No

If Yes, how much? \_\_\_\_\_

Why should your club be level 4? How do or will you meet the criteria above?



# Nottingham Trent Students' Union

## About

The grant funding model for societies at Nottingham Trent Students' Union was linked to the number of training sessions attended by committees. It also features an interesting model for the actual application form.

## The idea

The students' union wanted to develop their grant funding procedure and application process to make it more democratic and easier for societies to use.

## Development stages

The NTSU Societies Assembly is a meeting of all society committee members and any other students who wish to attend. Societies Assembly passed a motion in May 2013 imposing new restrictions on grant funding based on attendance at training. This requires society committees to attend at least 15 training sessions between them in order to qualify for grant funding.

Another development introduced by NTSU is the funding application form. A sophisticated table has been designed, featuring a number of tabs for different activities. This helps to avoid committees managing their events one by one

and encourages them to think more strategically about their whole year's activities. This table is updated by staff at NTSU each year to reflect changes to the procedure.

## Indicators of success

The system appears to be working well so far.

Although the method is quite complicated, with percentages etc., it does take quite a bit of explaining to committees. However once they understand the method they agree that it is a fairer process.

## Further information

Attached you will find:

- Document explaining the procedure in more detail
- Motion passed at NTSU Assembly
- [Grant application table](#)

There is further information about the NTSU funding procedures on their [website](#).

For more information about this, please contact [James Lindsay](#) at Nottingham Trent Students' Union.

### ***The Grant Allocations Process:***

Each society has two accounts. An A Account and a C Account.

#### **A Account**

The A account contains Grant Money and Membership Money. As this money is funded by the Student Union and individual students, there are restrictions on how it can be used.

#### **C Account**

The C Account contains money that the individual societies have gained from Sponsorships and Events. There are fewer restrictions on this money as it has been raised independently by the society.

#### **Societies Grant Allocation**

Grant Money is allocated at 2 points through the year, during the summer for the first term and then during December for the second and third terms combined. Each society is entitled to submit a Grant Form and each form is reviewed by the VP Activities and the Societies Co-ordinator.

The VP Activities and Societies Co-ordinator will judge each society's grant form on a number of conditions, these conditions are, but not limited to;

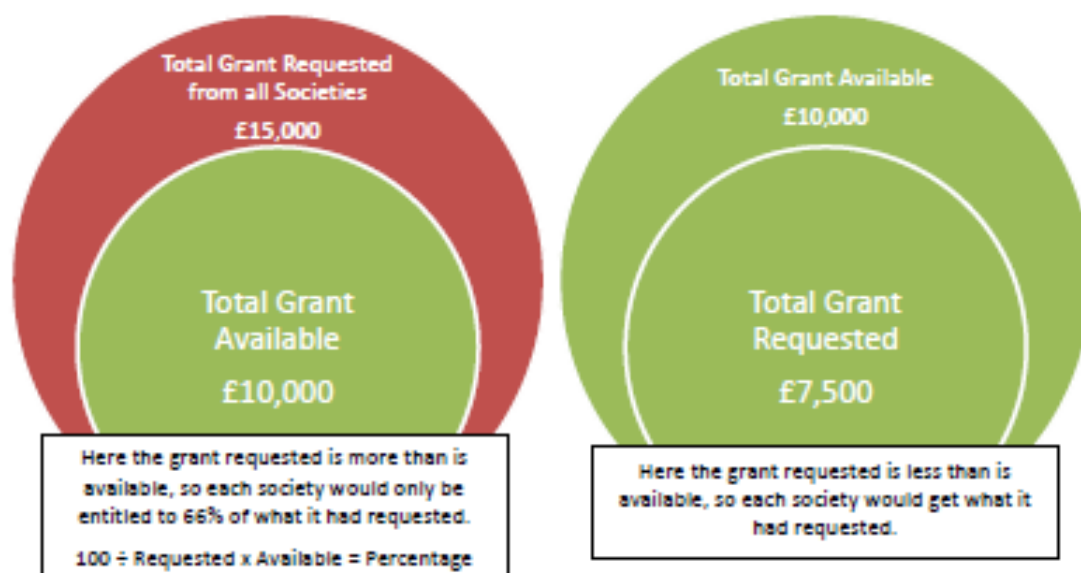
- Size of the society
- Number of events
- Number of members facilitated at each event
- Ability for the society to gain external funds
- Appropriateness of the events
- Sustainability of the society.

The VP Activities and Societies Co-ordinator can adjust a Grant Form should they decide the requested amount is a gross miscalculation. For example;

#### ***Example:***

If you apply for £300 for printing of flyers, we will reduce this because it is an unrealistic price; £100 can get you 5,000 flyers.

Grant Allocation is set at a defined amount per year and split down into the two allocation budgets. If all societies request more than is available then the requested amount will be reduced by the percentage available. Please see the diagram below;



The Grant Form also sets out the percentage levels for each expenditure that the Student Union will fund. These levels are decided by the VP Activities and ratified by Societies Assembly.

**Example:**

If you were organising a trip and staying overnight, we would fund 30% of the accommodation cost. So if the cost was £100 overall, you would be eligible for £30 towards the cost of the accommodation from the grant allocation and have to fund £70 via your C Account.

This percentage is worked out per event and BEFORE the overall funding percentage is applied.

**Expenditure Guidelines**

The following expenditure guidelines detail what percentage we are willing to fund of particular Items. You should fill in the following pages being as accurate as you can about your income and expenditure.

Type of Expenditure	Percentage we will fund
Accommodation	25
Administration	0
Entertainment	0
Competitions	100
Decorations	20
Food/Drink: Cultural	20
Food/Drink: Refreshments	20
Fresher/Refresher Fayre	60
Licenses	100
Other	100
Publicity/Printing	100
Speaker's Expenses	100
Specialist Equipment Hire	100
Tickets/Entrance Fees	20
Transport	50
Tuition/Coaching	50
Venue Hire (NOT SU Venues)	50
Minibus Hire	100

Please note that Sports Facilities hire and Tuition/Coaching are not covered by the following section - please wait till the final section to detail these.

These percentages can be changed by the VP Activities and Societies Co-ordinator to reflect current market conditions and demand.

**Top-up Method**

The total amount allocated from the Grant Form is calculated using the A account balance. The Grant allocation is used to top up the A account balance to the level requested in the grant form.

Using this method enables more money to be distributed to societies.

**Example:**

If you have £500 in your A account left from the previous academic year, and your grant allocation from your form was £750. Your account would get topped up £250. So less money was given from the grant, but the society still will have £750.

Remember grant allocation is only for eligible activities and items. You may have asked for £500 for an event but actually you may only be eligible for £200.



Each society will receive feedback on the allocation process; this will detail why an event has not got funding, why costs have been reduced and any other feedback deemed important.

After reading your feedback, refer back to your grant form on tab F 'Events Intro'. This details the percentage that is distributed to each item.

### **Equipment**

We fund equipment at 100% of that requested. However the VP Activities and Societies Co-ordinator can refuse the purchase of certain items depending on these conditions, this is not a definitive list;

- Number of members equipment will benefit
- Lifetime of the equipment
- Equipment cost
- Any additional costs involved.

Should the VP Activities and Societies Coordinator decide that a society is in need of development and that society is very dependent on equipment, they can set levels of funding in relation to the number of members. This would be used as an incentive for societies to go out and get more members to allow them to access more funding. If an agreement such as this is in effect, no other equipment can be requested via a grant form.

All equipment purchased by a society or by the Students Union on behalf of a society, remains the property of Nottingham Trent Students Union. Any damage or misuse of equipment will be funded from the responsible society's accounts and the provision of further equipment will be reviewed.

Created by

James Lindsay      &      Liz McCluskey  
Societies Co-ordinator      VP Activities

# **SOCIETIES**



## **Motion: Grant Funding & Training**

### Assembly Notes:

1. NTSU has a wide range of societies and provides a range of training sessions aimed at teaching committee members all they need to know about running their society.
2. The training sessions are reviewed yearly to ensure that they are kept up to date with procedures.
3. The training is provided free of charge to society committee members
4. The training sessions are displayed as events via the NTSU Website.
5. Each session is taken by a member of staff or executive officer that has completed the Train The Trainer qualification.

### Assembly Believes:

1. Training is essential in the day-to-day running and future of a society.
2. NTSU provides societies with funding to allow them to achieve their Aims & Objectives.
3. Health & Safety is a major concern in modern society, committees can often be liable for the health & safety of their society at NTU. It is essential for committees to be aware of the risks associated with running events.
4. Societies will are vulnerable to disaffiliation if they do not follow the democratic procedures of Societies Assembly or the Student Union.

### Assembly Resolves:

1. Each society committee must attend 15 training sessions between the whole committee before they can receive grant funding.
2. Each of the 5 training sessions must have been attended at least once by a committee member.
3. If a committee member attends the same session more than once, this will only count as one session out of the 15 minimum.
4. If a society does not comply with points 1,2 and 3 they will not be eligible for any grant funding from NTSU
5. The committee members are those that have been elected by the society membership

Submitted by; Liz McCluskey Society

Seconded by; Duke of Edinburgh Society

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