



■ Student Group Granting Program Handbook

By Student Group Services, University of Alberta Students' Union

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■ Student Group Grant Program (SGGP) Overview

The University of Alberta Students' Union aspires to create an exceptional and life-changing university experience for students through extra-curricular offerings that integrate learning, discovery, and citizenship to develop the intellect and imagination, educate leaders, and enhance a global perspective. To receive funding, an organization must demonstrate a benefit not only to their own group, but also to the campus community. The groups should benefit both in the short term and also in the long term by becoming more self-sufficient.

Funding Sources

The Student Group Granting Program is funded by two different sources:

The **University of Alberta Students' Union contributes \$80,000** annually for both Events and Operations applications. Only SU-recognized student groups are eligible for this funding.

Student Group Granting Adjudication Committee

Applications are reviewed and scored by the Student Group Granting Adjudication Committee. The Chair and Secretary of the Granting Committee ensure that all applications are eligible and provide policy and procedural guidelines for the committee.

The Granting Committee consists of:

Voting members

- At least 4 current executive members of student groups recognized by the Students' Union
- 2 members of the Students' Union Finance Committee

Non-voting members

- Program Lead, Student Group Services
- Specialist Events and Funding, Student Group Services

For more information regarding the Granting committee and its make up, please see the [Finance Committee's Standing Orders](#).



■ Applying for a Student Group Grant

The following items guide the Student Group Granting Committee's process and purpose. Groups must ensure that their application is consistent with all applicable guidelines and requirements.

Grant applications should demonstrate that the activities or operations of the student group contribute to the growth and vitality of the campus community, and that group members or participants will gain meaningful experiences from the proposed opportunity.

To assist the Program in funding as many student groups as possible in a year, there is a cumulative cap of \$2000 that a recognized student group can receive in the Program's fiscal year. This limit is cumulative between both the Event and Operations grants in the Program.

A group may only request a grant for up to the total of its remaining granting limit (eg. If a group has already received a \$1200 grant, they are only eligible to apply for an \$800 grant, not another full \$2000 grant). Event Grants will also have a maximum eligible amount of $\frac{1}{2}$ the total event cost to the student group, OR the remaining annual limit for that group, whichever comes first. Requests which surpass these limits will be reduced in the adjudication process, or may be disqualified altogether. You can contact clubs@su.ualberta.ca to confirm your group's eligible amount.

The Student Group Granting Program will not issue two grants for the same event. If multiple student groups are hosting a collaborative activity together, the groups may apply jointly for that event, by expressing this intention on the application form. The granting limit for the event will be the greatest of the annual limits of the groups, not the sum.

Student Group Granting Program Types (SU-only groups eligible)

Event Grant:

The purpose of the Event Grant is to provide funding to events either hosted or attended by members student groups, which provide positive, practical experiences which will enhance the student involvement experience, and contribute to student group goals. The Event Grant will provide no more than 50% of the total event expenses, up to the remaining annual limit of the student group.

Before attending or hosting the event, the student group will need to complete event risk management approval with the Office of the Dean of Students by submitting an application through BearsDen.



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Eligibility

To be eligible for any funding from the Student Group Granting Program, a student group:

- Must be fully registered and approved as an SU student group.
- Must have a community bank account under the student group's name with at least two signing authorities.
- Must demonstrate fiscal responsibility and no outstanding financial obligations to the Students' Union.
- Must submit all materials by the application deadline.
- The event must occur in the time period specified (see below). The group must submit the event through the Dean of Students' Office Event Risk Management Approval process and receive approval; events that are not approved through this process by the Office of the Dean of Students will have their funds rescinded and/or denied.
- For an Event hosted by the student group:
 - Must be used for any expenses related to events or activities hosted by student groups, including running a conference or competition.
- For an Event student group members are attending as ambassadors:
 - Must be used for any expenses relating to sending ambassadors to competitions, tournaments, business case studies, academic conferences, or professional development opportunities.

Operations Grant:

The purpose of the Operations Grant is to support a student group's general operations. Costs affiliated with specific events are not eligible for this grant and should be requested through an Event Grant application. This grant is recommended to student groups in their start-up period (typically the first two years of operations), and for groups who are experiencing extenuating circumstances which have begun to cause problems with financial health and security of the club.

The maximum funding received by a student group is \$500 every 2 program fiscal years. The grant cannot be used to reimburse items that have been acquired or paid for, in part or in full, by the student group prior to the application process.

Eligibility

To be eligible for any funding from the Student Group Granting Program, a student group:

- Must be fully registered and approved as an SU student group.
- Must have a community bank account under the student group's name with at least two signing authorities.
- Must demonstrate fiscal responsibility and no outstanding financial issues.
- Must submit all materials by the application deadline.
- For Event Grants, the event must occur in the time period specified (see below),. The group must submit the event through the Event Risk Management Approval process; events that are not approved through this process by the Office of the Dean of Students will have their funds rescinded and/or denied.
- Must direct funds towards basic group needs including, but not limited to:
 - Office Supplies



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- General Advertising Materials (i.e. not for a particular event)
- Printing costs
- Promotional items
- Office and locker rentals
- Web domain costs and site development
- T-shirts for long-term use (Multiple years, not given away or dated for a particular event)
- Banking fees
- Must not have received \$500 in Operations Grant funding in the past two years.

Ineligible Items and Costs

Part of the grant application will ask what the group plans to spend their grant on, if successful. The following items are ineligible for funding from the Granting Program. If they appear on the request list, the Committee may reduce the ask amount by the amount of money that would be allocated to that request. If the full request list is comprised of items of this nature, the application may be disqualified altogether.

To be clear, an Event Grant could have these costs included in the Event Budget, but under no circumstances can funding from the Student Group Granting Program or Equity, Diversity, and Inclusion Grant be used to purchase or subsidize them.

List of Ineligible Items and Costs

1. Alcohol and related items
2. Illegal substances
3. Sponsorships and bursaries
4. Wages, staff expenses, and honoraria
5. Prizes
6. Cannot be directly added to a donation total when an event is a fundraiser for a charitable organization or external agency
7. Retroactive granting for projects, materials, items that have already passed
8. Items cannot be purchases from organizations closely connected or related to the student group or the student group's individual members, unless prior arrangements have been made with Student Group Services.
9. Subsidies of individual memberships or costs associated with a one-time or recurring events.



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Tips & Tricks: Preparing Your Application

Remember: all the details that the Granting Committee will have to make a decision on your grant request are in the application you submit. This means they will not have as much context as you do around the goals and vision of the organization. Think about how you would explain the purpose of your grant request to someone who knows little to nothing about your student group!

- Avoid using acronyms or short-hand terminology that is specific to your student group or field of expertise, or, if you do shorten any terms, provide full definitions for them early on in the application as possible.
- Discuss and clarify your goals and intentions for the costs in detail, to help the Committee understand your group’s vision, purpose, and the use of the proposed costs. Demonstrate how the event or materials will help in carrying out your group’s mandate!
- You will have a much better chance if your activity is something that engages or is accessible to all of campus and not just your group and group members.
Note: This does not necessarily mean that internal events are ineligible! Be sure to explain how supporting an event with more internal impact could feed into long-term, external impacts on the campus community.
- In the application, you have the option of uploading supporting documents to accompany your application. This can include timelines, outlines, event proposals, layouts, posters, marketing plans, itineraries... in that section, the world is your oyster!
- We always recommend that groups have a contingency plan and other sources of funding as grants are never a guarantee—and it’s also rare that groups will get their full requested amount.
- If you’ve done a first run-through of your budgets and can see that you have a surplus or deficit, we suggest that you clarify in your application why your budget stands the way it does. There are risks associated with funding a student group that plans to be thousands of dollars in debt by the end of the year, and questions of “does the group need this money?” will arise if a group is applying for grants with a significant (10% or more) budget surplus. Your budgets should reflect your actual planning, and a significant imbalance can be cause for concern and negatively impact an application score.

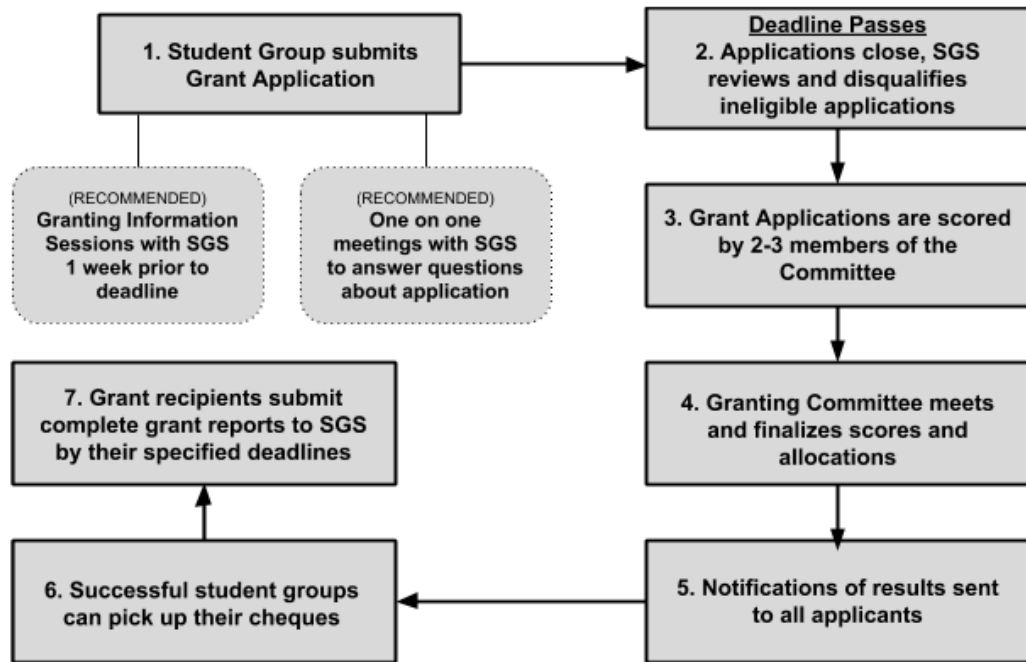


Application Deadlines, Process, and Scoring

There are three application periods every year, each landing on the last day of the specified month in the current fiscal year (May 1 - April 30). Applications must be submitted online through the [UASU Club Grants Program Bearsden Page](#), and are due by 11:59 PM on the deadline date. Late submissions will be disqualified from the session.

Application Opens	Application Deadline	Events must fall within
May 1	May 31	September 1 - December 31
September 1	September 30	January 1 - April 30
January 1	January 31	May 1 - August 31

Process Flowchart



- Grant applications will be submitted online via UASU Club Grants Program Bearsden page (<https://alberta.campuslabs.ca/engage/organization/sqsgsgrants>)
- On the day following the application deadline, Student Group Services Staff will audit and disqualify any ineligible applications.



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3. Staff will divide all eligible applications amongst members of the committee for scoring before the adjudication committee meeting. Each application is scored initially by at least two members of the Committee. The average of these two scores will be brought to the full Committee Adjudication Meeting for ratification. If the first two scores have a difference of 0.5 or more, a third Committee member will score, and their score will be added to determine the final average score, which is then brought to be ratified at the Adjudication Meeting.
4. The Committee Adjudication Meeting will take place to review, discuss, and finalize application scores.
During the meeting, initial scorers provide a brief summary of each application to the rest of the Committee, and explanation of the recommended scores. The voting members then decide whether to ratify the recommended score, or score the applications in-meeting (in the case of particularly contentious or vastly variant scores). If the decision is to score an application in-meeting, all remaining voting committee members will score the application, followed by discussion and a final vote.
5. Student Group Services will notify each applicant of the results by Approving or Denying submissions on BearsDen. All groups are welcome to contact SGS for additional details on their results. **Cheques will not be immediately available at this time.**
6. Student Group Services will contact successful groups when cheques become available. Cheques can be picked up from 0-81, Student Life Central, Lower Level SUB.
 - a. **Student groups must pick up their cheques within fifteen business days of being notified**, unless the groups make alternative arrangements with Student Group Services, as per the Finance Committee Standing Orders.
7. All groups that receive a grant must complete a Grant Report by the specified deadline. The report template and instructions will be provided. Keep all receipts for any grant-related purchases—you must submit them with your Grant Report.

Grading and Allocations

Event Grants and Operations Grants each have a corresponding rubric; they can be found at the end of this handbook in the appendix, and on the Student Group Granting Program BearsDen profile. Each rubric has a scale of 1.0 - 4.0 points. **The minimum score required to receive funding is 2.5/4.0.** The amount of money that will be disbursed to each applicant will be pro-rated according to how well the application scores; to receive the full ask amount, the score must be a 3.8/4.0.

When funds are being allocated, the highest-scoring applications are allotted their merited dollar amount first, in descending order to the lowest-scoring application. Some application



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rounds will have more applications than others, so in the event of a high-volume application round, some applications may not receive funding, even if they score a 2.5/4.0.

Any grant application request that is for \$200 or less will be considered on a pass/fail basis, and will receive either their full request if they receive a passing score, or no funding if they do not receive a passing score.

Common Disqualifications

- **Late Applications** - Any late submissions will automatically be disqualified. Online submissions are time-stamped, so there are no exceptions. Applications in hard copy are never considered.
- **Incomplete Applications** – make sure that all the questions in the applications are answered and that you have attached the necessary budgets. Many applications are automatically disqualified due to incompleteness when:
 - *a group forgets to submit one of the required budgets:* If your event budget is the same as your operating budget because your group only holds the one event, please be sure to note this in the application. If your group is missing an operating budget for the previous year, please be sure to provide a reason.
 - *a group does not submit an adequate budget:* Budgets are considered insufficient when all income, all expenses, or net surplus/loss are missing. Please note that a running total or bank statement are NOT budgets. If you need help creating a budget for your group, please contact SGS or visit the Resources & Downloads on our website.
- **Ineligible Items & Activities** - It's important to specify which item(s) the Grant funding will cover or subsidize, if your group receives a grant. If costs listed for the grant request are ineligible, the ask amount for your grant may be reduced to cover only the eligible item costs, or your application may be disqualified altogether if all the included items are ineligible.
- **Grant request is too little** - The granting minimum is \$100.00. Submissions under \$100.00 will be automatically disqualified.

Appealing an Adjudication Decision

Student Groups can appeal a granting decision only in the following cases:

- An undeclared or unaddressed conflict of interest; or
- Evidence of bias on the part of one or more reviewers; or
- Factual error(s) made by one or more reviewers that could have altered the outcome of review substantially; or
- Failure by an SGS staff member to provide required information to the review committee.

If the student group would like to file for an appeal, they must do so within one working week of the result notification sent to the group via BearsDen. Details on how to submit an appeal will be provided in the notification message.



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In the event that a valid appeal request is received, the Committee will meet again to discuss the nature of the appeal within one working week. Follow up with the appealing student group will be made by the Committee immediately following the Appeal meeting.

Any appeals that are filed will be processed by the Student Group Granting Program Adjudication Committee. All decisions made by the Committee regarding appeals are final.

■ Reporting

So You Got a Grant: Now What?

Applicants who are successful and receive funds from the Student Group Granting Program are required to submit a Grant Report, which includes a Report Form, receipts, a finalized Event budget (for Event Grants), and a written report.

Grant reports are submitted online through BearsDen. Just log into BearsDen and search up the Student Group Granting Program, scroll down to "Forms" and click on the appropriate report type. Follow through the prompting questions and it will lead you to the final page where you can upload the receipts and final budget.

Report Deadlines

Event Grants: Due 2 weeks following the **end date** of the Event.

Operations Grants: Due 1 year from the deadline of the application round used to apply for the grant

Failure to Submit Reports

Any late, missing or incomplete grant reports will affect a group's eligibility to receive funding from the Program. If no report or receipts are provided, the Committee may require the group to return the funds received.

To reinstate eligibility for the Student Group Granting Program, the student group must:

- Submit the outstanding Grant Report, including all its component parts, to Student Group Services; OR
- Submit an Auxiliary Report, outlining acceptable reasoning for the incomplete Grant Report, to the Granting Committee, via Student Group Services.

If a student group submits an Auxiliary Report, and the report is not considered valid or complete, the student group can be barred from accessing the Granting Program for up to and no longer than four (4) calendar years from the original Grant Report due date.

Report Contents

Grant Reports must include:

- All receipts for costs **covered or subsidized by the Grant funding received**
- A written summary of the impact that the funding had on the student group/on the student group event



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- A final actual budget for the Event or Operations of the student group (up to the report submission date)
- Report on the amount of unused funds (if applicable)

Funds are to be spent as outlined in your granting application. Any deviation must be cleared with Student Group Services prior to spending on a cost that was not in the approved proposal in the application. Any money that is unspent, lacking receipts or inappropriately allocated may be required to be returned.

In the event that a group returns Grant funds for any reason, the cumulative eligibility total does not reset; that is, a group is eligible to receive up to the annual limit for Event and Operation grants, regardless of use or non-use of the funding received.

Other items that are optional to include in the Grant Report are:

- Photos/media
- Testimonials and feedback from participants in an Event or student group operations

Granting Program Annual Report

The Student Group Granting Program is accountable to the Finance Committee of Students' Council for all Event and Operations funding. Student Group Services will prepare an annual report which summarizes the granting program for the year, including the number of individual grants provided to student groups, the number of applications received, and more!

Information provided in the Grant Reports filled out by student groups will be included in the Annual Report, which will be shared with stakeholders in the programs. If a student group who has received a grant and submitted a report has concerns about the use of information contained in their reports, they should contact Student Group Services to resolve the issue.



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■ Resources

Budget and banking resources:

- Financial Handbook
- [Operating Budget template](#)
- [Event Budget template](#)

Other Funding Programs:

- [On campus funding](#)
- [Off campus funding](#)



■ Appendix A: Event Grant Application Questions

The Basics

Student Group Name (no acronyms)

Note that this is the name to which cheques will be issued. Ensure that this is the name as it appears on your student group's bank account and all other official documentation. The Students' Union may charge a processing fee to reissue cheques.

Name of Event:

Must appear the same on the event risk management approval application. If the name changes after this is submitted, please inform Student Group Services at clubs@su.ualberta.ca.

Date of Event:

If a range/multi-day event, please specify start AND end dates.

Location(s):

Name of Executive (Primary Contact):

This is the person that we will contact with details on the results of your application.

UAlberta Email Address:

Name of Alternate Executive Member (Alternate Contact):

Student Group Services may contact this person to confirm details about the grant application.

UAlberta Email Address:

Request Amount:

Maximum request can be up to 50% of the event cost OR up to the group's remaining annual limit, whichever comes first.

All events must be submitted to the Dean of Students Student Event Risk Management (SERM) Coordinator for review. Events that are not duly processed will not be eligible for funding through this program. For full details please see the Dean of Students Website.

Have you submitted your event for approval by the Dean of Students' SERM Coordinator? (Yes or No, select one)

If "no", why not?



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Application Questions

For the following questions, please answer in full sentences. Word limits are specified in parentheses in the question text. Reaching the top end of the word limit is not required. Your answers to these questions are the only information the Adjudication Committee will have about your group to make a decision on funding.

What is your student group's primary role in this event?

- Attending (eg. a conference, training, etc.)
- Hosting

Please upload your student group's most recent edition of your constitution, which should include the mission or values statement.

Please describe the event. Include: What is the purpose of the event? What will be happening at the event? (250 words)

How does the purpose of this event relate to the mission or goals of your student group? (200 words)

What will participants in this event learn from engaging in this activity or event? How will it impact the University of Alberta community? (200 words)

Please answer this question if your student group is **HOSTING** the event on this application:
Please describe the marketing and communication strategies that your group will employ to attract students to your event. Include: a description of your group's target audience, examples of platforms and/or tactics for reaching and engaging with them. (200 words)

Please answer this question if your student group is **ATTENDING** the event on this application:

What skills, learning, or experience will you bring back for the student group? Why is attendance at this specific event important? (200 words)

Optional: Upload a supporting document with information about the event, such as an itinerary, poster, etc.

Please describe the assessment plans for your event. What are the metrics you will use to measure the success of the event? How will you collect assessments and/or feedback from participants? (200 words)

Finances and Banking Info

Please provide the following budgets in PDF Format:



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Event budget with detailed line items. Any speculation that moneys may be used for prohibited items or costs will result in that amount being deducted from the total money awarded.

Group Operating Budget (current year)

Group Operating Budget (last year)

If you did not have an Operating Budget for last year, please select one. Student Group Services will verify its records on recognition/registration as required.

- My group was recognized for the first time recently, so we were not in operation for the last fiscal year.
- * My group did not start handling money/financial assets until this year, so we did not have a budget.
- * Other reason for no prior budget:

For groups showing a surplus in their overall operating budget: What factors contributed to the group having a surplus this year? Why are you applying for a grant, instead of using your group's surplus to cover the costs of the event? (200 words)

OR

For groups showing a deficit (loss) in their overall operating budget: What factors contributed to the group having a deficit this year? How would receiving a grant help set this event up for success in the future? (200 words)

If your application is successful, for which costs or items, specifically, will the Student Group Granting Program funding be used? (List items; they should correspond with items that appear in your Event Budget.)



■ Appendix D: Operations Grant Application Questions

The Basics

Student Group Name (no acronyms)

Note that this is the name to which cheques will be issued. Ensure that this is the name as it appears on your student group's bank account and all other official documentation. The Students' Union may charge a processing fee to reissue cheques.

Name of Event:

Must appear the same on the event risk management approval application. If the name changes after this is submitted, please inform Student Group Services at clubs@su.ualberta.ca.

Date of Event:

If a range/multi-day event, please specify start AND end dates.

Location(s):

Name of Executive (Primary Contact):

This is the person that we will contact with details on the results of your application.

UAlberta Email Address:

Name of Alternate Executive Member (Alternate Contact):

Student Group Services may contact this person to confirm details about the grant application.

UAlberta Email Address:

Request Amount:

*Maximum request can be up to \$500 in a two year period. If you are unsure of whether your student group has received an Operations Grant in the last two years, please contact Student Group Services prior to submitting your application.

Application Questions

For the following questions, please answer in full sentences. Word limits are specified in parentheses in the question text. Reaching the high end of the word limit is not required.

Remember: Your answers to these questions are the only information the Adjudication Committee will have about your group to make a decision on funding.



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Please upload the current constitution of your student group, which should include the general mission or values statement of the organization.

With the mission in mind, what are some of the short- and long-term goals or projects that the student group hopes to realize? (200 words)

In the event that your application is successful, what will your group use the grant to pay for? (Please list all items that the grant would cover or subsidize.) (100 words)

What will be the impact of these items on your group's operations in the next year? (200 words)

How will this funding affect the student group in the long term (4-5 years)? (200 words)

What are some of the challenges that the student group is facing, or could face in the foreseeable future? How will the group anticipate or prepare to overcome these challenges? (200 words)

Financial Information

Please provide the following budgets in PDF Format:

Group Operating Budget (current year)

Group Operating Budget (last year)

If you did not have an Operating Budget for last year, please select one. Student Group Services will verify its records on recognition/registration as required.

- My group was recognized for the first time recently, so we were not in operation for the last fiscal year.
- * My group did not start handling money/financial assets until this year, so we did not have a budget.
- * Other reason for no prior budget:

For groups showing a surplus in their overall operating budget: What factors contributed to the group having a surplus this year? Why are you applying for a grant, instead of using your group's surplus to cover the costs of the event? (200 words)

OR

For groups showing a deficit (loss) in their overall operating budget: What factors contributed to the group having a deficit this year? How would receiving a grant help set this event up for success in the future? (200 words)