

**RUSA Allocations Board
Cap Sheet Report Fall 2020**

Outline:

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- Clustering
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Executive Summary

There are 4 key changes to our Dynamic Caps model:

1. For the Spring 2021 semester, the only event types being funded in a virtual environment are Standalone Program, Series Program and Organizational Maintenance. Generally speaking, we will not be funding Publications despite letting people apply for them. However, there may be exceptions, so we have performed due diligence on such clubs in the Fall 2020 Budget Weekend and also encourage respective applicants to come to semesterly Appeals Meetings.
2. Within each fundable event type, only fundable categories are Advertising, Supplies, Contracts, Software, and Other.
3. Dynamic Caps have been re-calculated and re-applied to fundable categories. The Dynamic Caps model uses historical correlations between attendance, amount requested, and amount funded. The data pulls from from Spring 2021 request values and the Spring 2020 Dynamic Caps models (for the correlations and historical amount funded)
4. We have revamped the way we fund contracts. RUSA Allocations removed the limit to the number of fundable contracts by size of event and changed it to capping off the total value of all contracts combined. Further, contracts significantly increased by difference that other categories decreased. For example, the dis-allocation of food funding went to contracts.

I. Introduction

In the spring of 2020, RUSA Allocations revamped its funding process to be more transparent. Traditionally, the process was cap-based, meaning that a fixed amount was set for a given funding category (i.e. room rental costs), and that events of a particular size would not be allocated any more than the cap.

The cap-based model has many advantages. It is a fair, content-blind way for the board to review budget requests. However, the accuracy of the numbers has a massive impact on shaping student organization spending. Clubs have shown a capacity to change their budgeting needs rapidly, and in the wake of COVID-19, the process will need to be even more flexible.

The board has produced a dynamic cap-based model. Rather than basing cap estimates off of existing numbers, similar to how the process has worked in the past, cap sheets are derived from a review of student organization needs.

II. Cap Breakdown

This report serves as a foundation for future cap-based models. It strives to take a more quantitative approach with two core elements.

The first element is a retrospective on historical caps. With the data available to us, the board was able to evaluate historically which caps have been successful and which clubs have not. The primary metric was take back amounts. Clubs that saw >25% of their semesterly funding taken back were omitted, while clubs that did not have significant take backs were integrated into the model. The board collected three data points: attendance, request, and amount funded. This yielded a unique linear model for each funding category. The information can be found below.

The second element is 'market costs'. This term refers to what the mean item category costs at this point in time. These numbers can be pulled from Rutgers-approved vendors which organizations are obligated to work with. The numbers can also be pulled via research of the widespread market averages at this point in time.

Last, for items where there was no reliable market or historical data, the board opted not to change the existing caps. We are seeking to only make informed decisions. Any arbitrary changes to numbers that clubs have grown accustomed to in the past would be counterproductive. This is a key distinction to make especially going into these unprecedented times of a virtual semester.

The remainder of this section details all notable changes to the Spring 2021 Caps.

Organization Name:										SABO #:	
Program 1 Name:					Program 2 Name:						
Event Description:	Date:	Attendance:	Location:	Admission Fee	Event Description:	Date:	Attendance:	Location:	Admission Fee		
X/S: 0-49 S: 50-149 M: 150-274 L: 275-424 XL: 425+	Requested	Description	Review 1:	Review 2:	X/S: 0-49 S: 50-149 M: 150-274 L: 275-424 XL: 425+	Requested	Description	Review 1:	Review 2:		
Room Rental & Equipment (9K+/-150+/-300+M+600+L+800+XL+1499)	\$0.00		\$0.00	\$0.00	Room Rental & Equipment (9K+/-150+/-300+M+600+L+800+XL+1499)	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00
Advertising (XS: 50 S: 250 M: 350 L: 620 XL: 1080)	\$0.00		\$0.00	\$0.00	Advertising (XS: 50 S: 250 M: 350 L: 620 XL: 1080)	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00
Food (XS: 370+/-5: 650+M: 450+L+2030+XL: 3540)	\$0.00		\$0.00	\$0.00	Food (XS: 370+/-5: 650+M: 450+L+2030+XL: 3540)	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00
Supplies/Duplications (XS: 170 S: 360 M: 720 L: 720 XL: 1120)	\$0.00		\$0.00	\$0.00	Supplies/Duplications (XS: 170 S: 360 M: 720 L: 720 XL: 1120)	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00
Total Contracts & Rights (no limit to number of contracts)	\$0.00		\$0.00	\$0.00	Total Contracts & Rights (no limit to number of contracts)	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00
Contract:			\$0.00	\$0.00	Contract:			\$0.00	\$0.00	\$0.00	\$0.00
Contract:			\$0.00	\$0.00	Contract:			\$0.00	\$0.00	\$0.00	\$0.00
Contract:			\$0.00	\$0.00	Contract:			\$0.00	\$0.00	\$0.00	\$0.00
Contract:			\$0.00	\$0.00	Contract:			\$0.00	\$0.00	\$0.00	\$0.00
Contract:			\$0.00	\$0.00	Contract:			\$0.00	\$0.00	\$0.00	\$0.00
Contracts: XS: 1350 S: 1970 M: 3890 L: 6330 XL: 8090 (total cap)			\$0.00	\$0.00	Contracts: XS: 1350 S: 1970 M: 3890 L: 6330 XL: 8090 (total cap)			\$0.00	\$0.00	\$0.00	\$0.00
Other			\$0.00	\$0.00	Other			\$0.00	\$0.00	\$0.00	\$0.00
*write what the other costs are			\$0.00	\$0.00	*write what the other costs are			\$0.00	\$0.00	\$0.00	\$0.00
TOTAL	\$0.00		\$0.00	\$0.00	TOTAL	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00
Organizational Maintenance					Series Program Name:						
Requested	Description	Review 1:	Review 2:		Requested	Description	Review 1:	Review 2:			
Room Rental and Equipment (1000; includes storage fees)	\$0.00	\$0.00	\$0.00		Room Rental and Equipment (Small: 1190 Large: 1790)	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00
Office Supplies (200)	\$0.00	\$0.00	\$0.00		Advertising (Small: 210 Large: 420)	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00
Advertising (400)	\$0.00	\$0.00	\$0.00		Food (Small: 1300 Large: 2500)	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00
Food for General Meetings (400)	\$0.00	\$0.00	\$0.00		Supplies/Duplications (Small: 500 Large: 1190)	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00
Giveaways/Involvement Fair (300)	\$0.00	\$0.00	\$0.00		Types of Contracts						
Software (150)	\$0.00	\$0.00	\$0.00		Contract 1	\$0.00				\$0.00	\$0.00
Duplications	\$0.00	\$0.00	\$0.00		Contracts: S: 3450 L: 6900 (total cap)					\$0.00	\$0.00
Phone Charges (100)	\$0.00	\$0.00	\$0.00		Other	\$0.00				\$0.00	\$0.00
Uniforms/Costumes (\$30 per person; max 15 people)	\$0.00	\$0.00	\$0.00		*write down what the costs are					\$0.00	\$0.00
*Uniforms/Costumes for performing groups only, but all groups can use advertising money to buy t-shirts	\$0.00	\$0.00	\$0.00		TOTAL	\$0.00				\$0.00	\$0.00
Other	\$0.00	\$0.00	\$0.00		Total Programming:					\$0.00	\$0.00
*write down what the other costs are			\$0.00	\$0.00	Total Organizational Maintenance:					\$0.00	\$0.00
TOTAL	\$0.00		\$0.00	\$0.00	Total Preliminary Allocation (Total Programming + Total Organizational Maintenance)					\$0.00	\$0.00
					Reviewed By (initial here):						

Figure 1: Caps for Spring 2021

A. Standalone Programs

In the event Rutgers becomes online, RUSA Allocations has decided not to fund **Room Rental and Equipment** or **Food**. We have instead placed focus on **Advertising, Supplies and Duplications, Contracts, and Other**.

We used the R^2 value for the historical request, as well as the average Spring 2021 request across size categories to generate a cap for each size:

The formula was $[\frac{1}{2} \text{ Attendance } R^2] + \frac{1}{2} [\text{Request } R^2] * 4$. The 4 is crucial because the R^2 represents half of the mean value, and the cap represents an upper bound. The cap is truncated and rounded to the nearest 10 value.

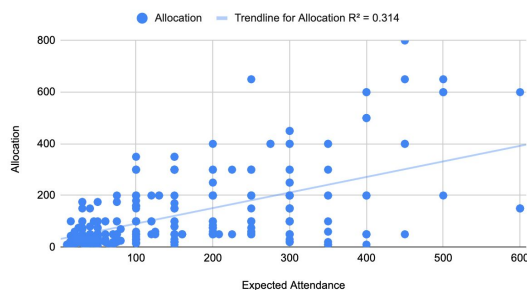
Occasionally, the re-calculated cap values for certain sized events were smaller than for the corresponding value of a smaller event. The cap values were then rounded up to the old values to be more in line. Further, occasionally, the re-calculated cap values for certain sized events were smaller than for the corresponding value of a smaller event. This was due to abnormally large outliers. Outliers were then removed and New Cap values aligned with historical caps.

Room Rental and Equipment:

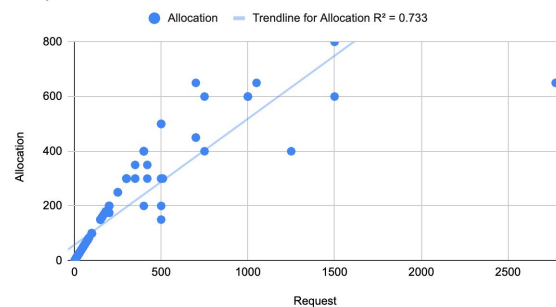
RUSA Allocations is not funding room rental and equipment during an online Spring 2021 semester.

Advertising

Attendance



Request



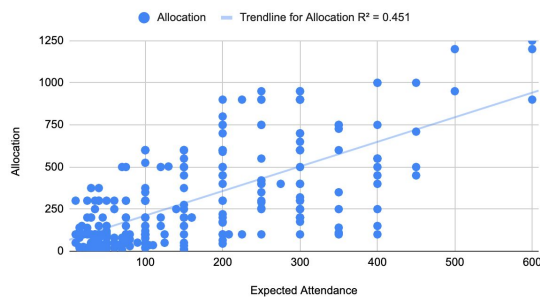
Size	Average Req Per Category (curr)	Max Att	Cap Formula	New Cap
XS(0-49)	21.97087379	49	62.98130098	60
S(50-149)	108.0744776	149	252.0091842	250
M(150-274)	117.254375	274	343.9669138	350
L(275-424)	238.5714286	424	616.0177143	620
XL(425+)	457.1428571	850	1203.971429	1080

Food:

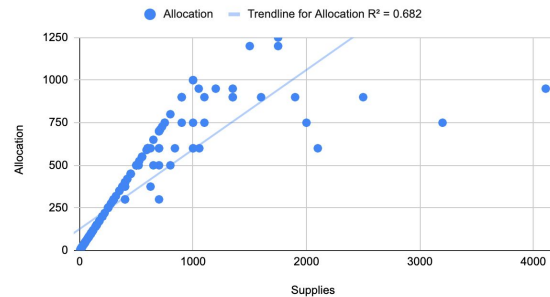
RUSA Allocations is not funding food during an online Spring 2021 semester.

Supplies:

Attendance



Request



Size	Average Req P	Max Att	Cap Formula	New Cap
XS(0-49)	90.464875	49	167.5920895	170
S(50-149)	165.5258209	149	360.1752197	360
M(150-274)	355.626875	274	732.2230575	730
L(275-424)	217.2727273	424	678.808	730
XL(425+)	257.1428571	850	1117.442857	1120

Contracts

We have revamped the way we fund contracts in two ways. Historically, RUSA Allocations limited the number of fundable contracts according to the size of the proposed event. The following decisions were implemented as it was shown clubs have been increasingly requesting contracts in an online COVID-19 semester:

First, RUSA Allocations have instead applied a cap to the total value of all contracts combined. Second, contracts significantly increased by difference that other categories decreased. For example, the dis-allocation of food funding went to contracts.

	XS				S				M			
	Old	New	Difference		Old	New	Difference		Old	New	Difference	
Room Rental & Equipment		170	0	-170		310	0	-310		620	0	-620
Advertising		110	60	-50		230	250	20		470	350	-120
Food		370	0	-370		850	0	-850		1540	0	-1540
Supplies		190	170	-20		460	360	-100		870	730	-140
Difference				-610				-1240				-2420
	L				XL							
	Old	New	Difference		Old	New	Difference					
Room Rental & Equipment		880	0	-880		1490	0	-1490				
Advertising		630	620	-10		1080	1080	0				
Food		2830	0	-2830		3540	0	-3540				
Supplies		1140	730	-410		1980	1120	-860				
Difference				-4130				-5890				

Differences in Cap Values

These differences in cap values were added to the average Old Cap Value of a singular contract:

	Speaker	DJ	Other	Average
Old Cap	1000	500	700	733.333333

	XS	S	M	L	XL
New Cap	1343.333333	1973.333333	3886.666667	6330	8090

B. Series Programs:

For series programs, the size categories were not as broad as the standalone programs. The costs for series programs tends to be more spread out, so simply multiplying costs by 7 is not feasible. Instead for small series programs, we took half of the extra small standalone program costs and multiplied that by 7. For large series programs, we took half of the small standalone programs costs and multiplied that by 7. Both of these sized events seemed to line up nicely with the attendance projects for most series programs.

C. Other Trip/Conference/Competition

RUSA Allocations is not funding physical trips during an online Spring 2021 semester. Any online trips have been re-categorized as a Standalone Program.

D. Organizational Maintenance

Organizational Maintenance was shown to be largely unaffected, with the exception being groups requesting for **software**. We have applied a \$150 Cap in accordance to doubling the average request of \$75.

To conclude Section II, the following spreadsheet summarizes the average per person change to a line item between 2019-2020 and 2020-2021 caps.

Changes to Caps			
	Fall 2020	Spring 2021	Percent Change
Standalone Program (average per max att.)			
Advertising	\$486.12	\$444.73	-9%
Supplies	\$892.40	\$637.85	-29%
Contracts	\$1,467.00	\$4,586.45	213%
Series Program (average per max att.)			
Advertising	\$580.00	\$315.00	-46%
Supplies	\$1,000.00	\$890.00	-11%
Contracts	\$2,483.00	\$5,175.00	108%

III. Summary and Future of Caps

As mentioned earlier, this is a foundation for future cap-based models. The board was working with limited information while being forced to work remotely. With that being said, the current caps represent a much more informed set of numbers compared to previous years. The board will constantly be monitoring the repercussions of this new model. In addition, there will be a few areas where the board will strive to make significant improvements:

First, the Allocations Board will try to bridge communication between the Allocations Board, Student Centers, and SABO. By building up a database with the most up-to date information, the board will have a better idea of what students are being charged and will therefore be able to produce more significant data points.

Second, the board is exploring a 'clustering' process. This process will aggregate similar organizations (i.e. cultural, religious, etc.) and generate a unique model within these clusters.

Third, the Allocations Board will audit organizations more thoroughly. This will help the Allocations Board understand which organizations effectively spend money, versus which clubs underspend their requests. A robust auditing system is necessary to complement an increasingly transparent system.

Last, the board will make concerted efforts to force organizations to track attendance using Campus Labs Event pass. This will give the board a reliable way to track event size. As attendance becomes a more reliable metric, the board can begin to eliminate size categories (i.e. small, extra large), and can generate caps as a direct function of the event size.