



The University of British Columbia, Department of Earth, Ocean, and Atmospheric Sciences

UNDERGRADUATE ACTIVITIES FUND (UAF):
STRUCTURE & GUIDELINES

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I. Acknowledgements

We would like to thank the Professional Activities Fund Committee (<http://paf.engineering.ubc.ca/>) for allowing us to use and modify their application forms and process to suit the needs of the Earth, Ocean, and Atmospheric Sciences Undergraduate Finance Committee.

Thank you to the Department of Earth, Ocean, and Atmospheric Sciences for allocating our yearly budget.

II. UAF Categories

Overall, the Fund covers initiatives such as Student Projects, Student Club activities, and Student Travel & Conferences, as proposed by EOAS clubs or by undergraduate EOAS students.

III. UAF Administration – Earth, Ocean, and Atmospheric Sciences Undergraduate Finance Committee (EOAS UFC)

Administrative support for UAF activities is provided through the Undergraduate Finance Committee which is composed of the President and Treasurer from each EOAS undergraduate club, as well as the EOAS Associate Head of Undergraduate Affairs. Each club is entitled to 1 vote when assessing applications. The EOAS Associate Head of Undergraduate Affairs is not entitled to vote.

For each Winter session, the EOAS UFC will designate two of its members from two different clubs to sign off on all funded applications. The committee will inform the Finance Clerk and the Director of Resources and Operations of the names and contact information of these two members.

IV. UAF Website

See link on <https://www.eoas.ubc.ca/academics/ugrad/organizations>

V. Process for Application

At the beginning of the academic year, the Undergraduate Club Council will be responsible for facilitating the UAF Information Session for potential applicants on the basics of how to apply. The purpose of this session is not to supplement the information provided on the UAF website, but rather, to show examples of successful applications and to answer specific student questions. First-time applicants are strongly encouraged to participate.

At the same time, students should use the UAF portion of the EOAS Undergraduate website, <http://www.eos.ubc.ca/about/ugrad/> to check eligibility and application regulations. From this site, students can download the application form. Once completed, students should submit their applications to ugradfinance@eos.ubc.ca.

V.1 Student Eligibility Regulations (for all UAF categories):

1. All applicants must be registered as UBC undergraduate students in EOAS specializations in good standing at the time of the application, and during the period of the project itself. The project itself may involve students outside of the undergraduate EOAS population (e.g., high school students, first year students etc.)
2. Applications will be accepted from students, student groups or clubs directly affiliated with the Department of Earth, Ocean, and Atmospheric Sciences. Applications will NOT be accepted from faculty members, staff, or off-campus organizations, or from UBC EOAS students applying on behalf of off-campus organizations or from UBC students who are not officially registered in an EOAS specialization.
3. If awarded UAF funds, applicants understand that they are ambassadors of both UBC and the Department of Earth Ocean and Atmospheric Sciences, and as such, agree to behave in a suitable manner for representing the University. If applicants do not act in a professional manner, they will not be reimbursed with UAF funds.

V.2 Funding Eligibility Regulations (for all UAF categories):

1. Student applicants MUST meet eligibility regulations as listed in *Student Eligibility Regulations* above.
2. Applications must support co-curricular activities and projects that lie outside, but yet are complementary to, a curriculum within EOAS. No curriculum-based activities are eligible for funding.
3. Applications must be received before the application deadline.
4. The event or travel must occur after the first day of Winter Session Term 1, before Dec. 23 for term 1, and before Aug. 31 for term 2.
5. Greater consideration will be granted to applications that benefit a greater number of the student body, directly or indirectly. Project examples of indirect benefit to students could include:
 - Establishing relationships between UBC EOAS students and institutions or industry.
 - Representing UBC by attending or presenting at a conference
 - Note: If you are presenting original EOAS research at a conference, please first apply for the EOAS Department's "Undergraduate Research Travel Fund", rather than the UAF.
 - Anything that would result in positive media attention for the UBC EOAS Department.
 - Sharing your experiences and what you learned with students at UBC through presentation, media or EOAS clubs.
6. Applications should not be reliant solely on UAF funding: it is expected that students will secure additional sources of funding. Additional funding solicited and secured must be noted in the completed application to support their proposal.
7. Please note the following restrictions on funding:
 - No student salaries/wages/coop fees shall be reimbursed by UAF funds.

- Meal costs are considered normal living expenses and therefore will not be considered for reimbursement.
 - No alcoholic beverages shall be reimbursed through UAF funds.
 - Where vehicle mileage is claimed, standard UBC rates shall apply. Each car should have a minimum of four people (three plus driver) in order to receive the full mileage amount.
 - Funding caps – if any of the following limits to a UAF application are exceeded, the application will be **rejected**
 - If the total event expenditure is \$500 or less, up to 70% of the income can be applied for from the UAF
 - If the total event expenditure exceeds \$500, up to 50% of the income can be applied for from the UAF
 - **No matter the total cost of the event, the maximum amount that can be requested from the UAF is \$4000 for a single application, with maximum of \$500 allowed for each individual who will be reimbursed** (e.g. a club may apply for \$3500 from the UAF if 7 people will be reimbursed, but the application will be rejected if only 6 people will be reimbursed)
8. Please note the following guidelines regarding field trips:
- To be eligible for funding, a field trip must meet the following criteria:
 - The trip is non-curricular
 - The trip is student-run
 - Field trip funding will be allocated in consideration of distance travelled from UBC.
 - *Please see regulation #13, UBC Policy 69: Student Safety Abroad.*
9. Industry nights:
- Industry nights defined as networking/social events with industry/alumni participants are strongly encouraged to seek industry funding.
 - Industry nights are only eligible for funding one time per academic year per specialization.
10. For all students travelling outside of Canada, it is required that you register your travel plans with the University through the Go Global Office. For more information, see UBC Policy 69: Student Safety Abroad:
<http://www.universitycounsel.ubc.ca/policies/policy69.pdf>

V.3 Criteria for Application Review and Award of Funding (for all UAF categories):

Applications submitted will be evaluated using the criteria listed below. Please see scoring rubric at the end of these guidelines.

Guidelines for Application Review for all UAF Categories: (as outlined in the UAF Structure and Guidelines)	Points
Quality and rationale of argument	5
Articulation of student/ team/group’s role in the department, including purpose, history, achievements to date, short and long term goals.	5
Impact of project on student learning (How many students are involved directly and indirectly? How engaged are students in learning?)	5
Influence of project on EOAS department’s reputation on a local, national or international level.	5
Quality of application form (including adherence to application format, spelling, grammar)	5
Thoroughness, clarity and transparency of budget (Have other funds been solicited and/or secured?) <i>* Note: If budget is missing, OR the amount applied for violates Section V.2.7 in the guidelines, application will not be considered for funding.*</i>	5

Based on calculated average, the following formula will be used to calculate student project funding amount. Please note: The EOAS Undergraduate Finance Committee reserves the right to increase or decrease this amount based on the Department’s funding allotment.

Points	% of funding awarded
30	100
29	95
28	90
27	85
26	80
25	75
24	70
23	65
22	60
21	55
less than 20	0

V.4 Notification

All applicants will be issued an email when the UAF website is updated with the list of successful applications, project reference numbers, the amounts awarded, and instructions for accessing funds. Individual emails to unsuccessful applicants will briefly indicate the reasons for the lack of the application’s success. Applicants must ensure that the email contact information listed on their application(s) is current.

V.5 Timeline of Funding Application Process

Prior to the first day of the term: The EOAS UFC will be composed of elected President and Treasurer from EOAS clubs, as well as the Associate Head of Undergraduate Affairs.

Third week of the term: The EOAS UFC will host a UAF information Session for prospective applicants.

Tuesday, October 10, 2017: The term deadline for submission of the UAF applications for Students. Applications will not be accepted after the deadline.

By Mid-Term: Announcement of Meeting of the EOAS UFC whose agenda includes the following:

- Recommendations and adjudication of UAF funding allocations.

UAF funding recommendations will be signed by the two designated UFC committee members and will be sent to the Director of Resources and Operations for approval.

UAF funding allocations occurs by this date. The EOAS UFC will issue an email to all successful applicants with the amounts awarded. The EOAS UFC will also issue individual emails to all unsuccessful applicants with a brief indication of the reasons for lack of success.

August 31st, following year: Last day for expenditure claims.

VI. Process for Reporting & Reimbursement

Successful applicants will be asked to write a one-paragraph summary on how they put the reimbursed money to good use. The summary will be included in future UAF applications submitted by the same club or individual. ***UAF applicants (i.e. club or individual) with previous application history must submit their most recent project summary along with their application for it to be accepted.***

All payment reimbursements are receipt-based and must be accompanied by a UBC Expense Claim Form and submitted to the Undergraduate Coordinator in the EOAS department office, who will log them, and forward them to the Director of Resources and Operations and the Senior Finance Clerk.

Note: UBC Expense Claim Forms have specific reporting requirements. You must have original receipts/invoice (not credit card receipts) and boarding passes. Please see Finance Clerk in EOAS office for details prior to project purchases.

VII. Student Project Funding Award Process

The EOAS UFC recommends the distribution of these funds, and there is a call for applications twice in each Winter session. Up to 50% of available funds will be dispersed in Winter Session Term 1, and remaining funds will be dispersed in Winter Session Term 2.

V.1 Funding Guidelines

Student applicants MUST meet eligibility regulations as listed in *Section V Process for Application*.

V.2 Examples

Some examples of projects that are eligible for funding include the following:

- Education-related activities (e.g., K-12 outreach, educational based field trips, conferences, etc.)
- Professional improvements to club/organization facilities
- Faculty-wide or Departmental-level conference hosting (i.e. WIUGC, etc.)
- Professional development and networking (e.g., work-shops, social events, etc.)
- Industry-related activities (e.g., career fairs, industry nights, conferences, etc.)

V.3 Application Review

All Committee members will receive access to student applications at least one week in advance of an Undergraduate Finance Committee Meeting near the middle of each term of the Winter session. Members are expected to review all student project applications and be prepared to discuss them at the meeting.

For purposes of application review, all UAF members will review all applications. When applicable, a maximum of one internal reviewer will be allowed to review his/her application or an application that may pose a conflict of interest; all precautions will be taken to avoid assigning an internal reviewer, but this may not be entirely avoidable.

The Undergraduate Finance Committee should be alerted to possible conflicts in advance of the meeting via the application form.

Prior to the middle of term meeting, each member of the committee will review all applications according to the outlined *Guidelines for Application Review* (as listed in Section V Process for Application) and an overall average ranking for each application will be calculated. The UFC will provide a scoring rubric to utilize as a guide for promoting funding review consistency.

Each member will share funding recommendations and proposed amounts of funding of each application at the Finance Committee Meeting.

Although the scoring rubric will be used as a guide by the UFC to allocate funds, **the UFC reserves the right to allow or deny any funding allocations regardless of the rubric in exceptional circumstances, under 2/3 eligible vote from the club representatives on the UFC.**

All applications from clubs which do not have members present on the UFC during the final funding allocations meeting will be deducted 5 marks.

The two designated UFC members will sign off on all applications and submit all successful applications/amounts funded to the Director of Resources and Operations.

VIII. Appendix I: May Sze Memorial Fund

To: Undergraduate Club Council; Undergraduate Finance Committee

From: Mary Lou Bevier, Associate Head, Undergraduate Affairs

Last Updated: 1 March 2017

Subject: **Terms of Use for May Sze Memorial Endowment Fund within the Undergraduate Activities Fund (UAF)**

Each year EOAS is required to report to the donors of the May Sze Memorial Endowment Fund on the uses/outcomes of their funds. The amount available from this fund may vary each year and any available funds are allocated through the Undergraduate Activities Fund.

1. A requirement of May Sze funds is that they be spent according to the criteria outlined in the UBC Development Office agreement with UBC, namely:

“Funding for undergraduate student activities in the Department of Geological Sciences.”

There are two important points here: a) May Sze funds must be used to benefit geology, geophysics, and/or geological engineering clubs and their students (and conversely, cannot be used to benefit ESSA or Storm clubs and their students), and b) May Sze funds explicitly must be used to support undergraduate student activities.

2. Along with the May Sze funds comes an expectation that the UCC will send a letter of thanks to the donors each spring, outlining how the funds were used towards achieving the stated criteria. The letter should include a brief description of how funds were used (project title(s) and short explanation(s)), as well as quotes from students who benefitted from the opportunity(ies).

The Head, Associate Head of Undergraduate Affairs, Director of Resources and Operations, and Senior Budget and Finance Clerk all should be copied on this letter.

CC: Roger Beckie, Head; Renee Haggart, Director of Resources and Operations; Kathy Scott, Senior Budget and Finance Clerk

IX. Appendix II: Undergraduate Activity Fund Reimbursement

Version: 12 November 2014

Following are current procedures for (A) non-travel reimbursements, and (B) travel reimbursements from the EOAS Undergraduate Activities Fund (UAF), including reimbursement for expenses incurred by the Undergraduate Club Council (UCC) that are charged to the UAF. All requests for non-travel or travel personal reimbursement are processed by EOAS Finance Staff. *All necessary forms are available Anita Lam or Kathy Scott in the EOAS main office. Anita and Kathy also are available to answer questions about receipts and how to fill out your claim form.*

(A) PERSONAL (NON-TRAVEL) REIMBURSEMENTS:

Procedures: To assist with expediting your non-travel personal reimbursement claims please ensure (where applicable) the following are provided to EOAS Finance Staff:

1. Completed **General Expense Claim Form**, including original supplier invoice or receipts (not just your credit card receipts). Please see Anita Lam or Kathy Scott in the EOAS Main office for examples of official receipts that are acceptable (pdf).
- Meals and Entertainment expense receipts must include purpose of expense, name and organization/affiliation of guests (write this information on the relevant receipt). An itemized receipt is required for meals expenses; a credit card receipt is not sufficient.
- For lost or missing receipts, a completed **Lost Missing Claim Receipt Form** may be provided in lieu of original receipts. *All reasonable attempts must be made to obtain the original receipt before the Lost Missing Claim Receipt Form is used.*
- Lost or missing invoices must be reissued by the vendor. Digital copies of vendor invoices are only acceptable provided there is (email) proof that they came directly from the vendor.

(B) TRAVEL REIMBURSEMENTS:

All travel clearances and claims must comply with university policies (UBC Policy #83) as well as granting agency guidelines where applicable. One type of travel reimbursement applies to the UAF:

1) Travel Claim (travel expenses personally accumulated by traveler):

1. Submit a completed **Travel Expense Claim Worksheet** and all original receipts to EOAS Finance Staff.
 - Please read the reverse of the worksheet carefully for policies on travel expense reimbursement.
 - Note: *Credit card receipts are not sufficient for reimbursement and original, official receipts are needed.* Please see Anita Lam or Kathy Scott in the EOAS Main office for examples of official receipts that are acceptable (pdf).
 - All airline boarding passes are required in addition to the airline ticket invoice.
 - If an original/official receipt is lost or missing, please complete a **Lost Missing Claim Receipt Form** in lieu of original receipts. *All reasonable attempts must be made to obtain the original receipt before the Lost Missing Claim Receipt Form is used.*