

Setting Goals and a Budget

The following is a suggested process for hall senates to use at the beginning of a semester, as it is setting goals and deciding how much money to set aside to meet those goals. It is designed for organization leaders to facilitate. The total amount of time will vary with the size of the group. But, the entire process should be possible to accomplish in two hours.

Facilitator's Preparation

1. Determine whether you want to do a semesterly or yearly budget planning. (Recommendation: Do semesterly-plus-one planning. That is, plan the current semester, plus the first event of the next semester, which will be paid for from funds from the first semester. If this is consistently done, the money will be there every semester.)
2. Make a large calendar of the semester ahead, including January.
3. Finally, make a list of your organization's projects and programs from the previous academic year. These will be the reference points for planning this year.
4. Determine how much money you will have to spend this semester (\$5.25 per resident/per semester, minus what is sent to the houses per resident/per semester).
5. Reproduce adequate copies of materials and create newsprint forms for processing large group activities.
6. Set a length of time and location.
7. Get all members of your organization to the planning session.

Large Group Planning

1. **Welcome planners and state purposes for meeting:**
 - A. Set goals and budgets for semester, including;
(The following should be displayed in writing, on newsprint)

Semester Goals and Budgets

1. Decide on Projects
2. Set Dates/Deadlines
3. Set Spending Ceilings
4. Set A "Requests" Budget

2. **Introduction to work:**

- A. There are four keys to our success in goal-setting and budgeting:
 1. Meet residents' needs & interests
 2. Do what we are uniquely equipped to do. (Like a good business, we must find our niche. We must choose things to do that we --better than anyone else --are equipped to do.)
 3. Only make commitments we intend to keep.
 4. Work hard to respect and cooperate with one another in the process
(The following should be displayed in writing on newsprint)

Four Keys to Success

Meet residents' needs & interests

Do what we're uniquely equipped to do
Choose commitments carefully
Respect, and cooperate with, each other

- B. Budgeting (putting price ceilings) requires goal-setting. Goal-setting requires and understanding of needs & interests of constituents. It also requires knowing our resources. Three key resources are:
1. OURSELVES: Our talents, experiences and commitments.
 2. MONEY: State your organization's approximate allocation for the semester (based on expected occupancy in third week).
 3. EVENTS: Our traditional events/projects; the University's upcoming events; and events, such as holidays, around which we can generate ideas and create programs

(The following should be displayed in writing, on newsprint)

Three Key Resources

OURSELVES
MONEY
EVENTS

3. *Small group work:*

To help us decide on events or projects for this semester (and the first of next semester...?), let's work in small groups to generate ideas

Divide the group into handfults of people (4-5). Ask them to:

1. Take 5 minutes to make a list of the top fifteen things you think your residents want or need.
2. Then, take 5 minutes to eliminate then of those things that would probably be the hardest for your group to provide.
3. Then take 15 minutes to look over the list of your organization's projects/programs from last year; the Panther Planner calendar; and pick three projects that might meet some of the needs/wants of your residents (Include one that might be a good fund-raiser, IF you are in debt.)
4. Then, take five minutes to create a totally new project, unrelated to the calendars or the list.
5. Then, take five minutes to attach a date or deadline to each of the five.
6. Return to the large group.

(The following should be displayed in writing, on newsprint, revealed one line at a time, as the group works.)

Small Group Tasks

List top fifteen needs/wants of residents
(5 minutes)

Eliminate ten that would be the hardest to provide

(5 minutes)

Decide on three projects (from handouts)
(15 minutes)

Make up new projects to meet needs/interests
(5 minutes)

Add deadlines/dates
(5 minutes)

In the large group, on newsprint, list the four projects each group suggested, including dated/deadlines. (Combine very similar items into one item, with the consent of the groups who generated the ideas. But make sure not to combine too many things into one item, so as to overwhelm a potential project chairperson.)

Next, ask for volunteers and nominees (make sure nominees are willing before writing their names on the newsprint) who would be willing to head up any of the items listed. Affix their names next to the project and dates. Any project without a chair is eliminated from consideration.

Next, anyone who wants to “champion” or speak up for the project may do so before the vote.

Next, hand out ballots for members to vote on the THREE projects they would most like to see the organization do, assigning 3 points to their favorite, two to their second favorite and one to their third. List them by Roman Numeral.

(The ballots should look like this.)

Goal-setting Ballot

Rank the top three projects you support, giving 3 points to your favorite, 2 to your second and 1 to your third.

I ____
II ____
III ____
IV ____
V ____
VI ____
VII ____
VIII ____
IX ____
Etcetera...

Announce the results, listing the four (or five, if going into the next semester) vote-getters. These are the Project Goals for the semester!!!

Budgets

1. Once the goals are established, it's time to set maximum funding amounts for each. Additionally, maximum amount for requests that come to the organization should be established. Here are the steps:
 - Distribute to each small group a Project Budget Sheet and announce the Total Semester Allocation amount available to your organization (including carry-over from last semester and anticipated income from a hall store), so this amount may be written on the Total Semester Allocation line.
 - Explain that the Request line represents a pool of money set aside specifically for groups that come to your organization seeking funding support for their projects and for new projects proposed from within your organization during the semester.
 - Ask small groups to meet again for ten minutes to decide what amounts they would supply to each of the projects (including the Request line). They must be certain that the total allocated to all projects in the column equals the Total Semester Allocation!
 - Bring the small groups back together, recording the amounts they suggest.
 - Choose one of the following methods to determine a final maximum amount for each project:

Averaging:

- a. Complete the Project Goals Sheet (displayed on newsprint) to obtain the average recommendation for each project.
- b. Vote on approval of the amounts that result from the averaging.

OR

Consensus:

- c. Complete the recommended appropriations sheet (displayed on newsprint) to use as a point of reference for taking motions from the floor.
- d. Take motions from the floor regarding specific maximum amounts to be allocated for each of the projects. Vote. Repeat, as needed.

[Note: When your organization wants to have a project for the primary purpose of generating revenue to purchase something or put on an event, treat it as an expenditure, but don't include the amount you intend to raise in the Total Allocation Available. In other words, don't count on the revenue. Regard the projects as consisting of seed money (allocated during the budgeting process and not needing to be returned), followed by fund-raising, followed by expenditure for the purchase or event.]

(The project goals sheet should look like this.)

Project Budget Sheet
Total Semester Allocation: _____

(Each column total must equal the Total Semester Allocation.)

| Small Groups: | | A | B | C | D | E | F | G | H | Avg. |
|-----------------------|--|----|----|----|----|----|----|----|----|------|
| Projects: | | | | | | | | | | |
| Project: | | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ |
| Project: | | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ |
| Project: | | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ |
| Project: | | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ |
| Project: | | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ |
| Total Semester Alloc. | | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ | \$ |

Dispersing Outside Requests for Funding

The following is a suggested method for disseminating funds to groups from within or outside your organization when they request money for new projects. If you decide NOT to entertain such request (as indicated by a zero on the "Request" line of the Project Budget Sheet) simply let groups know that there is no money available. If you decide TO consider such request, take these steps:

- a. Set up a review/recommendation committee, comprised of the chair (organization treasurer) and two others. That group's responsibility is to apply established criteria in reviewing each request and to make a recommendation to the entire organization, in the form of a motion.
- b. Establish criteria (i.e. standards which reflect well on your organization when it is involved in co-sponsoring an outside group's project)
- c. Require requests to be in writing, clarifying the following: what, where, who's sponsoring, who's benefiting, how the money will be used, why your group ought to support it and how much is being requested.