**5. Takeback Research**

**Contributors:** Sanjana, Anna, Kobi, Allen

**Advisor:** Laura

**Meetings with Advisor:** 3 Meetings (Intro Meeting, Progress Update Meeting, Final Update)

**Check-in:** 7/19/20

**Due date:** 8/30/20

**Description:**

Since we have begun to engage in researching takebacks of previous semesters we have been able to paint a better picture of where there are inefficiencies in our allocations and how we can improve moving forward to reduce takebacks. This summer we will look at the takebacks from the Spring 2021 semester, add this to our aggregated research, and develop a strategy as to how to reduce takebacks in the coming year. Feel free to use any analytical methods that the team deems effective to create a thorough analysis.

**Minimum Requirements:**

* Aggregate the Spring 2021 takebacks with the previous semesters that have been studied and analyze trends.
  + Put together the data
  + Inputted into the folder for the recent Spring 2021 Semester
* Identify patterns that cause increased takebacks in specific club categories, or that were possibly a result of the remote operating status of the university.
  + Put together clubs that have had high or low takebacks
* Contact clubs that have consistently had either very high or low takebacks to receive input on their methods of managing their funds
  + With the report, contact clubs detailing what happened
  + Assumed most didn’t use all funds because of the virtual environment
* Provide a report to the board detailing what you believe the underlying causes for higher takebacks are for specific clubs or club categories.
  + Averages of take backs for each category,
  + Clubs we call, the responses and feedback

**WRITE MORE NOTES AND MAKE THE PRESENTATION BETTER WITH SOME LOGISTICAL IMAGES**

**MORE COLOR?**

**BULLET POINTS SHOULD BE ROUND**

July 21 Notes:

* Takeback - how much money clubs have left over, could have been used for other purposes
* Goals: research the reasons why the clubs, look through data, create a plan for analyzing, and brainstorming the changes like cap sheets, penalties; provide a report for the board
* Folder 5 - Funding in Spring 2021
* [Takebacks Research.pptx](https://docs.google.com/presentation/d/1pCFXIjZInYnM4Iln208ke5NYBgXFTEmX/edit#slide=id.p1) - contains takeback research background, recommendations, etc
* Calls were insightful about the takebacks
* First two bullets for this meeting: analyzing patterns
* Previous winter semester - analyzing the same clubs? (how did take backs increase/decrease)
  + Call new clubs from last time and also include priority clubs
* Caps on food, other categories - limit excessive usage
  + Need to show receipts for all subcategories
* ~1.4-1.5 million of funding
* Co-sponsorship so that they are less clubs
* How do we plan on organizing and distinguishing the data?
  + **Categories**
  + **More than 50% or below 50% of the allocation**
  + COVID Effect - given the in-person situation
  + **Correlation to Auditing history versus the amount of take backs they have**
* Repetition - one is overhead whereas one is programming

Ways to Organize Data

* Average of Categories
* Compare the take backs from this semester to previous semester
* Find which clubs to contact
  + Full Take back
  + No Take back
  + Scaling it
    - More than $500, 75%
    - More than $5000, 50%

Google form to explain or give notice as to a program or funding discrepancy

Proper execution of this allows the organization to avoid the penalty

* Ask treasurers and find out if the problem they posed is their problem or our problem

In-take form + Questionnaire- similar to auditing intake

Getinvolved link to sign in to clubs event turned into QR code

**Next Steps:**

* In-take form + Questionnaire form implementation
* Penalty System