

# 2014 SIF Disbursement Application

APPLICATIONS MUST BE RECEIVED BY MONDAY, MAY 26 AT 11:59PM

The Caltech Student Investment Fund (SIF) annually awards money to Caltech clubs for equipment purchases and certain club activities. Your request for funding must coincide with the spirit of SIF disbursement philosophies as described below.

(1) Your organization must be self-sustaining. The SIF believes that any organization, whatever its cause or purpose, must not have its success and livelihood depend upon the charity of others. Thus, your organization should have a competent treasurer who plans budgets, estimates cash flows, and keeps the organization in good financial health so that the organization can further its cause and provide its intended service.

(2) Your organization should be open to the entire Caltech community. Our definition for "openness" is stricter than that of ASCIT; we believe your organization should **actively engage** people who would potentially be interested in your organization.

(3) Your organization must have a well-defined focus. It can provide members of the Caltech community an opportunity to service others, it can provide services to the Caltech community, or it can allow individuals to participate in activities that are not sponsored or provided by Caltech.

(4) Your organization should be active. It should actually provide the services that it promises to provide, and it should maintain an active member roster.

(5) The request should be for a **one-time only capital expenditure**. A capital expenditure is considered to be some sort of physical good that will be useful to the organization for an extended period of time. We will not fund activities that the organization participates in on a regular basis. For example:

- If you are the Dining Club, we will not consider funding your trip to eat at a French restaurant.
- If you are the Flying Team, we will consider funding a flight simulator.
- If you are the Kung Fu Club, we will consider funding a set of sparring pads.

(6) The request should not be for equipment/activities that should be ordinarily purchased/funded using the organization's own resources. We expect most organizations to collect membership fees or seek funding from other resources in order to provide valuable services to its members. For example:

- If you are the Running Team, we will not buy customized jerseys for your current members.
- If you are Booty House, we will not fund your alley events.

(7) The expenditure must have a direct and preferably long-term impact on the organization's success.

(8) Don't ask for a ridiculous amount of money. Be reasonable and keep the application straight-forward and simple. Remember, the Student Investment Fund wants to help out the Caltech community!

Finally, your club **must have a bursar account** in order to expedite the process of receiving an awarded disbursement. To setup an account if your club doesn't already have one, visit Malina Chang in the Dean's Office.

With the bursar account setup, awarded disbursements must be submitted to Beth Larranaga no later than December 31, 2014. No extensions or exceptions will be granted for claiming disbursements after this date.

Name of Organization:

Executive Officers (name, position):

Contact Person (with e-mail address):

Amount Requested:

Reasons for Requesting Funding:

Will you accept partial funding? ☐ Yes ☐ No

Include the following documents with this application (**required**):

- (1) List of items to be purchased, and price quote. If sold online, please provide the link
- (2) Description of your organization, including purpose and mission
- (3) 2013-2014 membership roster (please list active members only)
- (4) 2013-2014 club-sponsored activities (including estimated number of participants)
- (5) 2013-2014 financial statement (expenditures, fund-raising, etc.)
- (6) 2014-2015 budget/activity plan (forecast)

Please submit your application electronically (zip, tar, etc.) or by mail (MSC 951) to Caroline Werlang at [cwerlang@caltech.edu](mailto:cwerlang@caltech.edu) by **Monday, May 26, 2014 at 11:59pm**. Also, there may be special cases where your organization, by the merit of its services to the community, will be considered for disbursement regardless of the qualification of its request. Please e-mail [cwerlang@caltech.edu](mailto:cwerlang@caltech.edu) if you feel your organization deserves special attention or if you have any other questions.