	SAAA POLICIES & PROCEDURES	
	Reference / Name	MGT 1.2.14-001 SAAA Chapter Funding Scheme
	Revision No	0
	Revision Date	02 - 04 - 2020
	Owner	MFIN

Purpose

To set out the basis for and manner in which SAAA delivers financial support to assist SAAA Chapters on an equitable and transparent basis to further the knowledge of Members, further the growth of the organisation and nurture the SAAA community spirit.

Scope


This policy & procedure covers the budget planning, requests for funding, criteria for acceptance and application, and allocation of funds delivered by SAAA to its Chapters.

Prerequisites

1. Justification
 - a. Targeted investment by the organisation to support educational activities (enhanced safety outcomes) and activities that market the SAAA (protection and growth of membership base) is considered to benefit all SAAA members.

2. Business Planning and Funding Categories
 - a. The annual Business Planning process should include the definition of funds that will be made available under the following categories:
 - i. General Funding Pool - approximately equal to 10% of the projected Member Subscription Revenue for the forward year
 - ii. A Supplementary Funding Pool (special projects) approximately equal to 25% of the General Funding Pool
 - b. Notwithstanding the above, the budgeted amounts must always be subject to financial conditions and within the financial capacity of the SAAA, and shall be considered planned (firm) budget items
 - c. On a case by case basis, and where budgeted funding is exhausted, additional Chapter funding may be considered for special projects if matched dollar for dollar by a Chapter
 - d. Regional activities and projects, under the guidance and direction of the SAAA Regional Chapter Co-ordinators (RCCs) may also be considered on a case by case basis.
 - e. Funds under the General and Supplementary Funding Pools must be available from the beginning of each financial year subject to approval of compliant funding requests. Funds attributable to other funding requests will be advanced as and when requests are approved

3. Requests for funding
 - a. Each year, and ideally by 30th June latest, a Chapter should submit a simple funding application to the SAAA Treasurer. This should identify:
 - i. The proposed application / purpose of funding
 - ii. The proposed budget by major item

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- iii. A brief account and reconciliation of how any funding was applied in the current (or past) year and the outcomes

4. Compliance criteria and allocation of funds

- a. The scope of an activity the subject of a funding requests will be compliant provided a number of the following general criteria are met:
 - i. Meeting third party Chapter administrative costs
 - ii. Engaging with non-SAAA members, organisations, communities, councils etc
 - iii. Purchasing of tools, equipment or infrastructure for Chapter use
 - iv. Marketing of SAAA at events and seeking to sign-up new members
 - v. Training and demonstration aircraft building and maintenance techniques (ideally taking opportunity to invite non-SAAA members where relevant / practical)
 - vi. Education around flight operations, regulatory matters and operational procedures (ideally taking opportunity to invite non-SAAA members where relevant / practical)
 - vii. Educational and general aviation interest events / attendance around build / restoration projects (ideally taking opportunity to invite non-SAAA members where relevant / practical)
- b. It is accepted that compliant activities can in many circumstances be practically and effectively met as part and parcel of social events. However, funding requests relating purely to social events with no material or effective content regards any of the above eligible activities will not be accepted
- c. Allocation of budgeted funding should, as a general rule, be on the following basis:
 - i. General Funding Pool – Level 1; 70% of the General Funding Pool in amounts approximately in proportion to the number of SAAA Members in each Chapter to total SAAA membership numbers
 - ii. General Funding Pool – Level 2; the balance of the General Funding Pool after the Level 1 funding provision, is available on a first come first served basis to assist new Chapter start-ups and smaller Chapters that do not have the economy of scale of larger Chapters
 - iii. Supplementary Funding Pool - Allocation of funds available from the Supplementary Funding Pool will be on a first come first served basis

5. Regional / combined Chapter activities

- a. SAAA's Reginal Chapter Co-ordinators (RCCs) have a role to play regards identifying / facilitating / co-ordinating opportunities to pool funding for common benefit where practical – effectively gaining better leverage from available funding. For example – educational events, marketing materials such as event banners and sails, or high value equipment or tools that could be implemented or shared amongst a group of nearby / regional Chapters.

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- b. RCCs may seek additional funding for regional activities, such as regional events – education, fly-ins etc. Funding for these activities will be outside of the funding provisions identified for specific Chapter funding.

6. Activity Feedback

- a. There is an expectation that Chapters, and where relevant RCCs, will provide occasional / ongoing feedback and news relating to their activities – for publication as general interest, for example, in Member Newsletters, AirSport and elsewhere.

Responsibilities

1. Building the Chapter Funding Scheme requirements into the Business Plan and setting budgets – Hon. Treasurer (TREAS) / MME (Manager Membership and Public Relations & Events)
2. Completion and submission of Chapter Funding Requests – Chapter Executives / Leaders
3. Identification of opportunities to gain financial leverage / efficiency through combined Chapter activities and asset sharing – RCCs (Regional Chapter Co-ordinators)
4. Completion and submission of Regional activity funding requests - RCCs
5. Assessment of Chapter and RCC sponsored Funding Requests and allocation of funds – TREAS, and PRES & MME at discretion of TREAS
6. Authorisation of funding payments – TREAS if within the budgeted total funding allowance stipulated in a current approved Business Plan; otherwise IAW prevailing financial authorities defined from time to time (refer MGT 1.2.02-000 Manual of Authorities and MGT 1.2.03-000 Authorisation for Expenditure)


Procedure

1. Business Planning

- a. By no later than 1st June each year:
- i. Review actual vs budgeted Chapter Funding status for the current financial year, membership numbers and assess the financial capacity of the business to deliver similar for the forthcoming financial year
 - ii. Work with the Manager Business Planning to incorporate provisions into the forthcoming financial year Business Plan for the proposed General Funding Pool and Supplementary Funding Pool amounts

2. Funding Requests

- a. Chapter Funding
- i. Ideally by 30th June preceding each financial year, Chapter executives to submit completed funding requests to TREAS
 - ii. Chapter Funding Requests to be completed using the online web-based form or the standard template per FIN 3.0-02 SAAA Chapter Funding Request – TEMPLATE.xlsx substantially in the forms (refer also Annexure 1 of this policy & procedure)
 - iii. An online web-based application is preferred.

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- b. Regional Funding activities and projects
 - i. RCCs to submit proposals for regional projects / activities for consideration to TREAS.
 - ii. TREAS to seek views from at minimum the National President of SAAA (PRES) and MME
 - iii. If approval in principle is agreed, RCC to complete an Authorisation for Expenditure (AFE) IAW MGT 1.2.03-000 Authorisation for Expenditure

3. Assessment of Chapter Funding Requests, allocation of funds and authorisation
 - a. TREAS to confirm current number of SAAA members assigned to a Chapter and in so doing define the nominal funding available for compliant purposes from the General Funding Pool, with due consideration of the relative size and status (new / recent start-up etc) of a Chapter
 - b. In the event that funding for compliant purposes is sought in excess of the nominal allowance attributable under the General Funding Pool, TREAS to consider additional allocation of funds from the Supplementary Funding Pool. TREAS may also consider options for additional funding in circumstances where a Chapter wishes to contribute from internal or other sources on a dollar for dollar basis on top of any additional SAAA funding.
 - c. TREAS to authorise payments with financial approval IAW an approved prevailing approved Business Plan, or otherwise IAW prevailing financial authorities defined from time to time (refer MGT 1.2.02-000 Manual of Authorities and MGT 1.2.03-000 Authorisation for Expenditure)


4. Authorisation of RCC Funding Request AFEs
 - a. TREAS to authorise payments with financial approval IAW prevailing financial authorities defined from time to time (refer MGT 1.2.02-000 Manual of Authorities and MGT 1.2.03-000 Authorisation for Expenditure)

References

1. MGT 1.2.02-000 Manual of Authorities
2. MGT 1.2.03-000 Authorisation for Expenditure
3. FIN 3.0-02 SAAA Chapter Funding Request – TEMPLATE.xlsx

Definitions

Acronym or Terminology	Concise definition or meaning
MFIN	Prevailing SAAA Manager Finance
MME	Prevailing SAAA Manager Membership and Public Relations & Events
PRES	Prevailing National President of the SAAA
TREAS	Prevailing SAAA Hon. Treasurer or MFIN

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Annexure 1

Chapter Funding Request standard form FIN 3.0-02 SAAA Chapter Funding Request – TEMPLATE



SPORT AIRCRAFT ASSOCIATION OF AUSTRALIA

SAAA Chapter Funding Request

This funding request must be completed in order for SAAA Chapters to obtain SAAA corporate funding support.

Funding approvals and quantum will be IAW the related policy. Requests for funding that relate purely to social events with no material or effective content in respect of any of the eligible criteria will not be accepted.

Chapter:	[No.] [Location] (i.e. 24 Jandakot)
Date Raised:	[dd/mm/yyyy]
Driver / Position:	[Name / Position] (i.e. An Other / Chapter Secretary)
Financial Year:	FY [y1y2] (i.e. FY1819)
No. Chapter Members: (as at date of request)	[X]
Proposal / Justification:	(i.e. Chapter 22 hosts / attends events / fly-ins each year with the objective of raising the profile of SAAA and seeking to grow the Membership. We seek funding support to acquire 2 pull-up banners and 2 sails, similar in form and content to those used at Narromine Oct 2017 - and ideally using existing artwork. We have been successful in growing the membership as a result of our past attendance events, and consider this additional investment will assist our growth objectives. We are happy to be the custodian of these materials, but would be happy to make them available to nearby Chapters).
Budget Request:	(i.e. \$1100 - comprising sails \$325 each with bases; banners \$150 each; freight \$150)
Reconciliation of prior FY funding: (Application of funds, outcomes etc)	(i.e. Funding was requested for the FY1718 to support the running of and convening of X educational and Y general interest events. Non-SAAA members were invited to all events, including also various representatives from local council to build community awareness of activities. 6 new members signed up)

Office use


Criteria to support funding:

1. Meeting third party Chapter administrative costs
2. Engaging with non-SAAA members, organisations, communities, councils etc
3. Purchasing of tools, equipment or infrastructure for Chapter use
4. Marketing of SAAA at events and seeking to sign-up new members
5. Training and demonstration of aircraft building and maintenance techniques
(ideally taking opportunity to invite non-SAAA members where relevant / practical)
6. Education around flight operations, regulatory matters and operational procedures
(ideally taking opportunity to invite non-SAAA members where relevant / practical)
7. Educational and general aviation interest events / attendance around build / restoration projects
(ideally taking opportunity to invite non-SAAA members where relevant / practical)

Request Relevant (y/n)

	General Funding Pool		Supplementary Funding Pool	
	Level 1 pool	Level 2 pool	100% SAAA funded	\$/\$ SAAA/Ch supported
Funds Approved:	\$1,000	\$100		
Total agreed funding:	\$1,100			
Supply comments:	(i.e. SAAA to supply all items, or SAAA to supply some, or Chapter to supply etc)			

Approved by National Treasurer: (Signature / Date)

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SPORT AIRCRAFT ASSOCIATION OF AUSTRALIA


SAAA Chapter Funding Request

Detail - Worksheet


Use this worksheet to develop the funding request value if required, or if not developed elsewhere

Chapter: [No.] [Location] (i.e. 24 Jandakot)
Date Raised: [dd/mm/yyyy]
Driver / Position: [Name / Position] (i.e. An Other / Chapter Secretary)
Financial Year: FY [y1y2] (i.e. FY1819)

Description		Unit (Fixed, \$/d, \$/n, \$/hr)	\$	Qty	Total \$
Event marketing materials	Pull-up banners (new)	Fixed \$	150	2	300
	Sails (prior supply cost)	Fixed \$	325	2	650
	Freight x 2 - estimate	Fixed \$	150	1	150
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				Grand Total Estimate	1100

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Chapter Funding Request online form template – Corporate Reference / Policies & Procedures Management / Finance / Chapter Funding Form


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☰

Chapter Funding Request

SAAA Chapter Funding Request

Name *

First

Last

Email *

Chapter Number & Name *

0 of 30 max characters

Date Raised *

Position

0 of 50 max characters

Financial Year *

2020/2021

Number of SAAA Chapter Members

0 of 20 max characters

as at date of request



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Proposed Activity *

- Youth Engagement
- Chapter Equipment Purchase
- Training Seminars / Maintenance / Fly in
- Safety
- Marketing & Social Events

Justification of Proposed Activity *

0 of 2500 max characters

Youth Engagement

Enter amount required. If item is zero please enter and move to next item

Chapter Equipment Purchase

Enter amount required. If item is zero please enter and move to next item


Training Seminars / Maintenance / Fly in

Enter amount required. If item is zero please enter and move to next item

Safety

Enter amount required. If item is zero please enter and move to next item

Marketing & Social Events

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Enter amount required. If item is zero please enter and move to next item

Total

\$ 0.00

Reconciliation of prior FY Funding *

0 of 2500 max characters

Submit