

# SAAC Budget Training

FY22 Budget Period - 2022-2023



Hi everyone, we want to thank you for attending budgeting training. A few things, please make sure you're muted. If you do have questions during the presentation, you can put them in the chat, or you can wait till the end where we will have a Q&A. FYI we haven't done this in a couple years so expect this to be pretty rough around the edges. As you know, every student organization has a budget, and in the next 30 minutes we will be reviewing the process of requesting money for events not this year, but next year.

If you are here on behalf of an Academic/Professional, Religious/Spiritual Life, or Political Organization, Class Council, Fraternity or Sorority Organization, or any organization that has an "Agency" account in SOFO, you are not required to be here and you may log off. If you are unsure of your category, it is best that you stay to ensure that you meet the training requirement.

# Presentation Timeline

1. Budgeting Overview
1. How to Submit a Budget on CCC
1. Important Budgeting Guidelines
1. Budgeting Guidelines by Category



We're going over a quick overview, then (most important) go over actually submitting your budget, then discuss the rules we expect you to follow.

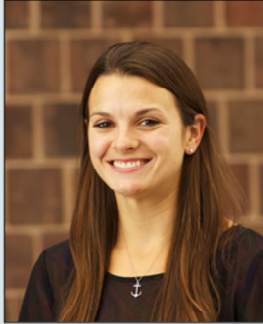
# Steps for Business Managers

1. Attend SAAC Budget Training – You're in it!
2. Submit Budget by Deadline
  - Budget Submission: *March 3<sup>rd</sup> at 11:59 pm*
  - March 26: SAAC notification of Approved Budgets to Organizations
  - April 2: Deadline for Student Organizations to Appeal Budget
  - April 6 & 13: SAAC Budget Appeal hearings
  - April 14: ACJC Appeal form opens for appeals that were not resolved by SAAC



Attached here is the budgeting timeline. Please take photograph, these deadlines need to be hit or else your organizations will be penalized through ARC or at worst you won't have a budget for next year.

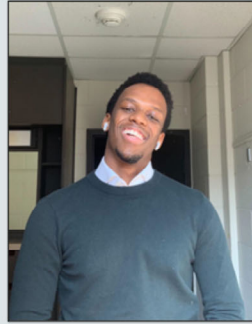
# SAAC Leadership



❖ Jennifer Nicholson,  
EBA '18  
❖ Manager of Finance



❖ Anne-Marie Algier,  
EdD '16  
❖ Associate Dean of  
Students & Director  
of Student Activities



❖ Murimi Kanyogo  
'23  
❖ Treasurer



❖ Cole Okuno  
'23  
❖ Deputy  
Treasurer

So budgeting is handled by SAAC, meaning SAAC leadership as seen here.

# Student Accountants

Maria Plessia



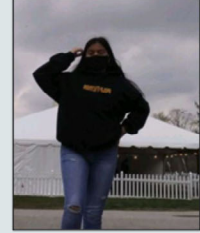
Amany Zaid Mahran



Marissa Carlson



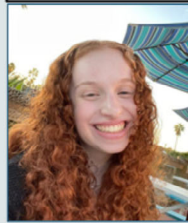
Lisbeth Hernandez



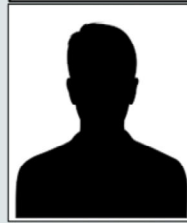
Giovana Flores



Madison King



Potter Flynn

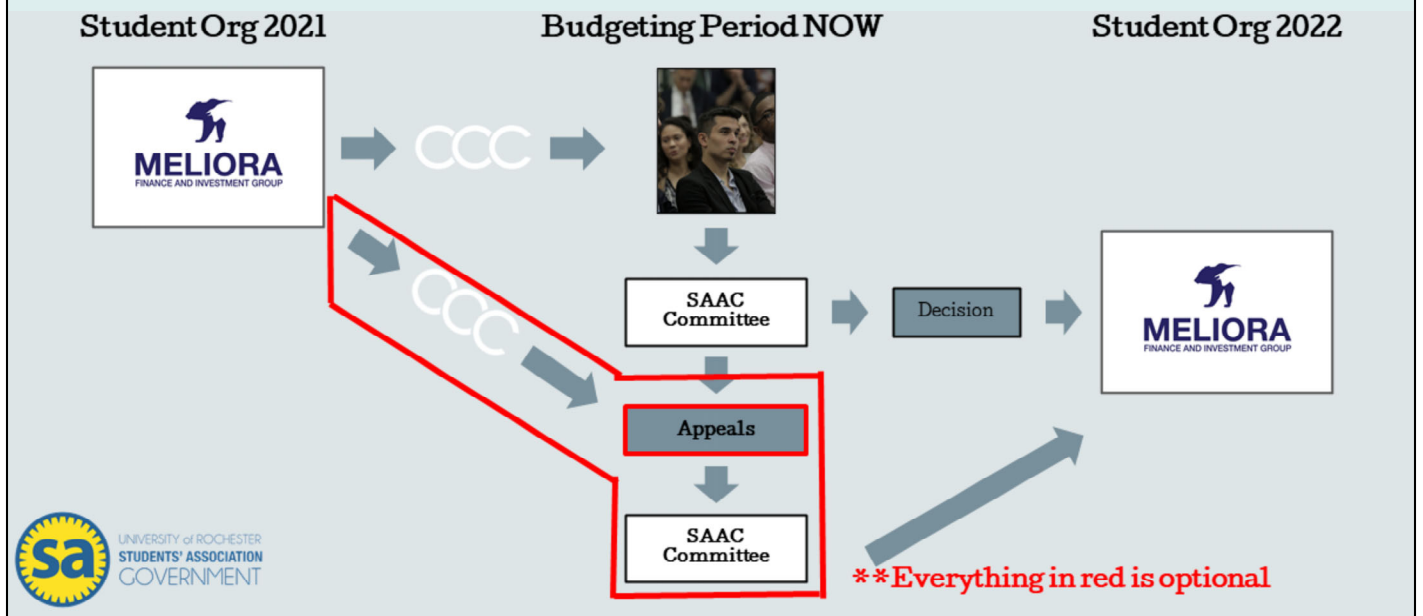


Cez Garcia



As well as the student accountants who volunteer through SAAC. I'm sure you're seeing some familiar faces here. Importantly, your student accountant by category is responsible for reviewing your budget. Lisbeth, in the top right for example, is the student accountant for all hobbies and interests groups, meaning that during our review process if you're the BM for the astronomy club, then Lisbeth, is the one who takes the first look at your submission.

# Budgeting Process



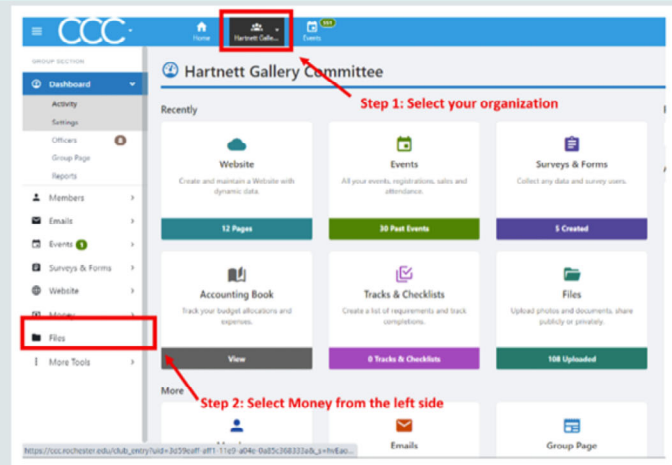
Don't get hung up on technicals we'll cover those in a minute. For a quick overview, budgets will be submitted through CCC where they will be received by the student accountants. The accountants will make sure everything is okay then pass your submission through to SAAC committee. SAAC will make sure that you're following the rules etc. Then pass a decision to your organization. We'll almost always renew your old budgets for events as long as you've been filling out reflection forms. Generally, we won't allocate for a new event unless your organization has done it in the past. So, if I'm MelFIG for example, I can't ask to hold a \$2000 program because... well... we didn't do it last semester. But, if MelFIG had asked for a supplemental last fall and had done well (ie. fill out the activity reflection forms), then... SAAC would consider adding the new event.

So that in a nutshell is the process for most people. See the red box there? That is the appeal process. Say your organization feels that you didn't violate a rule or you warrant an exception to the SAAC decision. Then, your organization will need to fill out an appeal form on ccc to discuss why you feel that your group is different etc.

Before I show how budgets and exception forms are submitted through CCC, please take a picture here.

# Budget Submission Process

**Step 1: Select the Student Organization that you are the Business Manager of and will be submitting a budget for:**



So to walk through the submission process, know that budgets are submitted on CCC. Go to your organization, then get to your money, it says files on the ppt, that's not true, go to money.

The screenshot shows the CCC Accounting Book interface. On the left, a sidebar lists various group sections, with 'Money' expanded to show 'Accounting Book'. The main area is titled 'Accounting Book' and contains a table of budgets. A red box highlights the '2022-2023 General Budget Submissions' row. Below the table is a 'Transactions (1)' section with a search bar and filters.

| Budgets                                              | Allocations/Revenues | Expenses      |
|------------------------------------------------------|----------------------|---------------|
| <a href="#">2022-2023 General Budget Submissions</a> | \$0.00               | \$0.00        |
| 2021-2022 Budgets                                    | \$3,820.00           | \$0.00        |
| Group Funds                                          | \$0.00               | \$0.00        |
| <b>Total</b>                                         | <b>\$3,820.00</b>    | <b>\$0.00</b> |

**Step 2: Under the Money Module drop down, select “Accounting Book” and select the Budget that you would like to submit line items for by clicking on the Blue Hyperlink**

**\*\* Your “Accounting Book” will look different based on the Budget type that your Group is eligible to submit\*\***

You click on that, it'll drop down then you hit the accounting book. That blue hyperlink will pop up then click there.



**Budget - Wilson Commons Student Activities**

Admin Settings View All Groups **Create Budget Request**

2022-2023 WCSA Operating Budget Filter By: Wilson Commons Stud... Download Report

**Budget Submission** Budget Review & Approval Payments Budget Closed

Group officers can submit budget requests. Budget administrators review submissions and approve/reject the amounts requested. Group officers can submit payment requests and budget approval can approve/reject. No budget requests, approvals, payments can be made anymore.

| Totals       |           |          |                  |                   |
|--------------|-----------|----------|------------------|-------------------|
| \$0.00       | \$0.00    | \$0.00   | \$0.00           | \$0.00            |
| Funds Needed | Requested | Approved | Payment Requests | Payments Approval |

Wilson Commons Student Activities

### Step 3: Insert Budget Request by selecting “Create Budget Request”

\*\*You should Create a new Budget Request for each Event/Activity. Items such as GIM and Annual Costume funding

(Performance Organizations only) should be created as their own Budget Requests, as well.

The next step is like submitting a green form but for each event. Let me repeat that... every event that includes SAAC funding needs to have a budget, even your GIM.

## Step 4: Complete Step 1 of the “Create/Edit a Budget Request by:”

### 1. Selecting the appropriate Budget Request Type

- o General Interest Meeting
- o Operational Expenses
- o Event, Activity, Program or Competition - On-Campus
- o Event, Activity, Program or Competition - Off-Campus
- o Fundraiser
- o Annual Costume funding
- o Coach/Instructor Payment
- o Practice/Rehearsal
- o Other

### 2. Providing a Title/Name for the Budget item

### 3. Indicating the funding Priority (Low, Medium, High)

### 4. Providing Event Location

### 5. Providing the Expected/Approximate Number of Attendees

The screenshot shows a web form titled "Create/Edit a Budget Request (Step 1 / 2)". The form has several sections with red boxes highlighting key input areas:

- Budget Request Type:** A dropdown menu is open, showing a list of options: "General Interest Meeting", "Operational Expenses", "Event, Activity, Program or Competition - On-Campus", "Event, Activity, Program or Competition - Off-Campus", "Fundraiser", "Annual Costume Funding", "Coach/Instructor Payment", "Practice/Rehearsal", and "Other".
- Description:** A text input field for providing a title or name for the budget item.
- Priority:** A dropdown menu for selecting the funding priority (Low, Medium, High).
- Documents:** A section with a "Upload" button.
- Event Location:** A text input field for providing the event location.
- Event Start Date:** A date input field with a "Format: MM/DD/YY" label.
- Event End Date:** A date input field.
- Expected Number of Attendees:** A text input field for providing the expected number of attendees.

Here you see the main points to fill out.

| Item Type    | Amount Requested | Amount Financed By Group | Total Funds Needed | Notes                     |
|--------------|------------------|--------------------------|--------------------|---------------------------|
| Advertising  | \$ 20.00         | \$ 0                     | \$ 20.00           | Flyers to Advertise Event |
| <b>Total</b> | <b>20.00</b>     | <b>0.00</b>              | <b>20.00</b>       |                           |

+ Add item

Back Save

**Step 5: Complete Step 2 of the “Create/Edit a Budget Request” by:**

1. Selecting your “Item Type” \*\*Item Type will vary based on the Budget Type

*\*See Additional Document Labeled Budget Type by Mission Category*

2. Funding Details: Amount Requested (from SAAC) + Amount Financed by Group (funding that will be earned via ticket sales, co-sponsorships, etc.) = Total Funds Needed (this field auto populates)

3. If there are more than 1 expense for this Budget Item, select the “+ Add item” button to add additional line items. Once all Expenses have been recorded, select Save.

In the next step, you enter in your requested amounts. For some groups like club sports, it’s expected that you finance an equivalent amount to what you’re requesting.

**Budgeting Exception Form** DRAFT

Edit Copy Link Manage

### Budgeting Exception Form

This Exception form should only be used when requesting an exception to a SAAC funding guideline during the Annual Budgeting process.

Review of these forms will occur during the Budget Review process and approval or denial will be granted after budgets have been finalized by the Committee and Senate.

Does your Organization have exceptions that need to be requested? \*

Yes

No

I don't know

Submit

**Step 6a: Once all Budget Items have been added, click Save. A Budget Exception form will pop up for each Entry:**

**\*\*If you have included a Budget Item that is not permitted per the SAAC Funding Guidelines, you must select YES at this step\*\***

Last bit, say you're requesting something in your budget that doesn't follow SAAC funding policy. Say you want food for an event. If you feel that your organization merits an exception, then you fill out the budgeting exception form. Note two things. First, you actually need to understand and read our guidelines which is something I hope you do to request this. Second, don't confuse this with the appeals process I talked about earlier, this is not the appeal process, that comes later

**Step 6b: If you have selected “Yes”, you will need to Provide:**

1. Your Organization’s Primary Mission Category
2. Exception Type requested:
  - a. SAAC Funding Guideline
  - b. Travel beyond 400 miles
3. Specific Funding Policy that you need an exception to
4. Justification to warrant Approval of exception request

**\*\*Fill out even if you’ve done these in the past**

The screenshot shows a web form with the following sections:

- Does your Organization have exceptions that need to be requested? \***
  - Yes
  - No
  - I don't know
- What is your Organization's Primary mission category? \***
  - Awareness
  - Club Sport
  - Community Engagement
  - Cultural/Identity Based
  - Hobbies & Interests
  - Intercollegiate Competition
  - Media/Publication
  - Performing Arts
  - Programming
  - Visual Arts

If you are unsure of your Primary mission category, please reference the file below.
- Document:** [Mission\\_Category](#)
- What are you requesting an exception for? \***  
(Maximum authorized answers: 3)
  - SAAC Funding Guideline
  - Travel (400+ miles one-way)
  - Club Sports only: Max Rollover exception
- What funding guideline(s) are you requesting an exception to? \***

A. SAAC will generally not fund food.  
B. SAAC will consider budgeting refreshments for programs if they are integral to the program or are culturally relevant and educational in nature.
- Why should an exception be granted to the funding guideline(s) above? \***

Food is necessary for this activity because \_\_\_\_\_
- Please upload file with additional information, if**

Here we have an example, say and organization wants to travel beyond 400 miles of the university. Even if you’ve done events in the past which have typically gotten exceptions, you’re expected to fill out the form again.

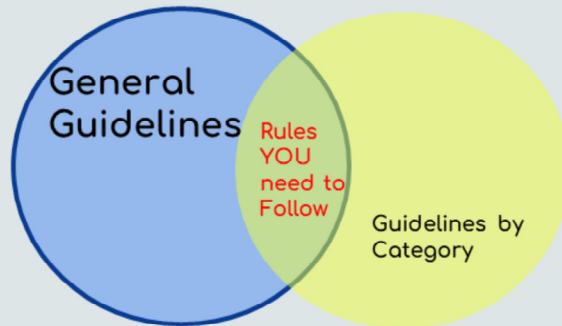
# How are Budgets Evaluated?

- **Budgeting Guidelines**
- Overall SOAR Grade
- Advisor Feedback
- Completion of Activity Reflection forms
- SAAC Accountant Feedback
- SOFO Feedback
- Storage Assessments



So how does SAAC look at budgets? The above are the primary factors the accountants look at when reviewing your submission. Up on the top in bold is the budgeting guidelines, which is the biggest variable for the committee. These are broken up into two categories, general funding guidelines, and mission-specific guidelines. These are the hard rules we fall back on when budgeting for events. They are written into law, literally we have a big pdf of all the rules which we will send to you, and I can't emphasize how important it is for you all as BMs to understand our guidelines. We're going to take the rest of our time to go through these one by one.

# General Guidelines



I want to talk about our general guidelines. Look at the venn diagram, it's like a venn diagram of laws. Every organization has general guidelines, and mission-specific funding guidelines. You need to follow BOTH. They're not one to one. Everyone, all organizations... from equestrian to engineers without borders they have the same general guidelines. But guidelines by category are different. They vary, so a academic professional organization has different funding rules than a club sports for example.

But we're starting with general, and again, these general guidelines apply to everyone and while they're not the only rules, but they're the big ones to follow.

# General Funding Guidelines

for all Student Organizations

- \$80 will automatically be allocated for each Organization for General Interest Meetings (GIM)
- Funded activities should occur while classes are in session
- Funded activities must be registered on the CCC
- Travel should be kept within a 400 mile radius\* of the University
  - \*If you are submitting an itemized budget item for travel beyond the 400 mile radius, you will answer YES to the exception form question.
- Student Organization's can not profit from SA Funding



So to cover the general guidelines... again they apply to everyone.



# General Funding Guidelines

for all Student Organizations

SAAC will generally **not** consider funding:

- apparel and giveaways
- testing or certifications for individual members
- bonding programs or private activities for organization members
  - ↳ Including Study Breaks
- rental vehicles
- food expenses
- charitable donations
- activities or items that violate University policies or federal/local laws
- off-site venue or location fee



Additionally...

# General Funding Reminders

for all Student Organizations

- SAAC will no longer fund Photography or Videography in budgets
  - The funds previously budgeted for photography will be used to establish a different (more equitable) process for requesting a photographer for events
- Programs and speakers with expenses that exceed \$1,000 and anticipate less than 50 attendees, will be funded every other year
- GIM funds are allocated as \$80 total and are no longer restricted to Spring or Fall use



Additionally...

## Pre-determined Rates for FY22

- Gas should be budgeted at \$.20/mile
- MVR funding can not exceed \$20 per academic year
- Advertising materials (printing flyers, posters, etc.) for **fundraising activities** can be funded for up to \$25 per event
- Advertising materials (printing flyers, posters, etc.) for **programs or events open to the entire undergraduate population** can be funded up to \$50 per event
- Sanitarian fee is \$30 per event



Next we have some predetermined rates, so things like gas, advertising etc. which is common enough to merit per event/mile basis.

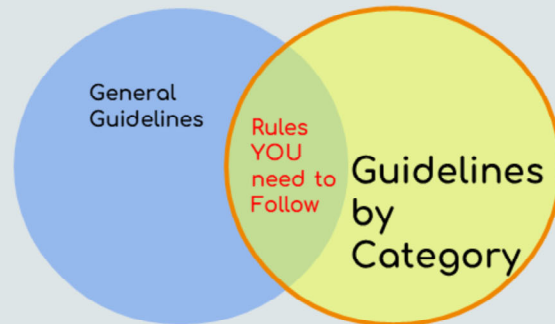
# Pre-determined Rates for FY22

- Maximum of \$500 for decorations for entire academic year.
- ECM approximate fees by space can be found here:  
<https://www.rochester.edu/college/wcsa/event-planning/resources/ecm-packages.html>
- **Printing Rates:**
  - Ruth Merrill Printer: B&W \$.005/imprint | Color \$.12/imprint
  - Copy Center: B&W \$.10/imprint | Color \$.25/imprint
- **Public Safety:**
  - Officer \$63.75/hour | Supervisor \$74.50/hour



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# Guidelines by Mission Category



What we just covered were general guidelines and pre-determined rates. The last thing I want to cover today are our secondary rules, our guidelines by category. Again, these are category specific, and supersede the general rules. These guidelines were provided in the e-mail sent to all Business Managers yesterday, please save your questions until the Q & A part of the training.

If you are the Business Manager for an Awareness, Visual Arts, or Hobbies & Interests organization – the following guidelines do not apply to you. We will be doing a Q&A after we go through these guidelines, so please feel free to stay until the end if you have questions.

# Club Sports



# Club Sports General Guidelines

SAAC will consider funding:

- One team only
- Up to half of a club sports expenses at a max of \$5,000 in subsidy
  - Coach/Instructor fees are in addition
- Travel expenses within a reasonable amount
  - Including gas, lodging, and tolls

SAAC will not fund:

- Other Universities travel expenses
- Trophies, prizes, etc.

SAAC will set a max & min rate for Dues for 2022-2023 at:

- Minimum \$0 | Maximum \$240 (75% of the Student Fee)



Club sports are unique in that they bring in dues. SAAC will match them on their dues, so if a club sport bring in \$2000 in dues, then we will provide \$2000 in dues.

## Club Sports – Hobbies & Interest “recreational” Guidelines

Up to half of coaching/instructor fees at a max of  
\$40/hour or \$2,000 per year

SAAC will consider funding the following if 1/2 of the club  
will attend:

- Travel and lodging for up to 2 events annually
- Individual registration fees up to \$400/event at a max  
of 2 events annually



Club sports are subdivided into recreational and competitive, which differ in how much can be spent on coaching, and travel.



## Club Sports – Intercollegiate “competitive” Guidelines

Up to half of 1 coach/instructor fees at a max of \$25/hour or \$1,500 per year

SAAC will consider funding the following:

- up to 7 events for a competitive club sport if it is not in a league.
- all official league events and up to 2 non-league events

SAAC will **not** consider funding:

- individual fees for competitive club sports



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# Community Engagement



## Community Engagement Guidelines

SAAC will consider funding:

- all expenses for benefit dinners and awareness programs that are accessible to the entire campus community, excluding food
- Supplies related to fundraising or engagement programs if integral to the activity and engages the undergraduate population, excluding food
- Up to \$300 for ECM for one large scale signature fundraising event per year
- Food if an event or outreach program exceeds 5 hours in length
- Reasonable refreshments for non-University of Rochester participants regardless of the event duration



Community org is different in that it allows for more flexibility around food and fundraising.

Cultural & Identity Based



# Cultural & Identity Based Guidelines

SAAC will consider funding:

- All items for dinners, excluding food
  - Organizations can request up to \$200 via the Supplemental Funding process to help cover the costs of up to 20 tickets to one Signature Cultural dinner per year
- Up to 4 signature Cultural/Identity based programs per year
- One live music performer (ex. DJ, live band, etc.) at a max of 2 programs per year, up to \$350 per program, if it is vital to the success of the program



Cultural and Identity based groups have rules around large scale events.

Intercollegiate



# Intercollegiate Guidelines

## SAAC will consider funding:

- Expenses that may occur when classes are not in session if approved at the time of budgeting.
- Only one team.
- Rental vehicles to transport competition materials.
- Rental cars for competitions outside the 400 mile radius.
- Registration fees up to \$400 and travel expenses within a reasonable amount.



Intercollegiate gets a lot of exceptions to rules from the general guidelines.

# Intercollegiate Guidelines

based on additional funding sources

## Hajim Organizations:

- SAAC will consider funding:
  - A maximum of two competitions per College Student Organization, within reasonable limits.
- SAAC will **not** consider funding:
  - Equipment or supplies

## SA Budgeted Organizations:

- SAAC will consider funding:
  - A maximum of 7 regular season competitions, within reasonable limits.
  - Equipment or supplies in line with Organization's mission or needs.



We can break down intercollegiate by additional funding sources.



## Media/Publication and Programming



Two more

# Media/Publication and Programming Guidelines

SAAC will consider funding:

- All items necessary to the operation of the Organization, within reasonable limits.
- An equipment fund for Media Organizations that provide a significant service to the Campus Community.
- Prizes (including e-gift cards) for organizations that meet the following criteria:
  - Primary mission category of Programming.
  - A demonstration that the prize is critical to the success of the program.
  - The total value of the prize(s) do not exceed \$25.



# Performing Arts



Last one

# Performing Arts Guidelines

SAAC will consider funding:

- ECM at a maximum of \$1,500 in subsidy per event for 2 events annually
- Student Organizations with a secondary mission of Cultural/Identity Based may request full ECM funding (at a max of \$3,000) so long as event will be free and open to the undergraduate campus community
- Up to \$30 per costume at a maximum of 30 members (\$900 annually)
- Half of instructor fees for organizations that primarily perform and/or spread awareness of their artistry via for competitions.

Max of \$40 per hour/\$2,000 per year



Performing art rules revolve around ECM, coaching, and costumes.

# Questions?

## ❖ First Point of Information

> Funding Guidelines

## ❖ Second Point of Information

> Your Student Accountant:

- Cez Garcia - cgarcl5@u.rochester.edu
- Maria Plessia - mplessia@u.rochester.edu
- Marissa Carlson - mcarls11@u.rochester.edu
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- Amany Zaid Mahran - azaidmah@u.Rochester.edu
- Potter Flynn - pflynn5@u.rochester.edu
- Giovana Flores - gflores8@u.rochester.edu
- Madison King - mking38@u.rochester.edu

## ❖ Other Points of Contact

> Deputy of Treasurer

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> Treasurer

- Murimi Kanyogo -  
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> Manager of Finance

- Jennifer Nicholson -  
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**\*\*READ THE GUIDELINES**



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