SAAC Budget Training

Presentation Timeline

1. Budgeting Overview

2. How to Submit a Budget on CCC

3. Important Budgeting Guidelines

4. Budgeting Guidelines by Category (Breakout Sessions)

Steps for Business Managers

✔ Attend SAAC Budget Training – You're here!

❏ Submit Budget by Deadline

- Budgets Open: February 9th
- Budget Submission: *March 6th at 7:00 pm*
- SAAC Notification of Approved Budgets to Organizations: March 29th
- Deadline for Student Organizations to Appeal Budget: April 5th
- SAAC Budget Appeal Hearings: April 9th & 16th:

SAAC Leadership

- ❖ **Tina Muller**
- ❖ **Manager of Finance**

- ❖ **Brian Magee**
- ❖ **Interim Director, Student Activities & Leadership**

- ❖ **Marissa Carlson '24**
- ❖ **Treasurer**

- ❖ **Joshua Jones '25**
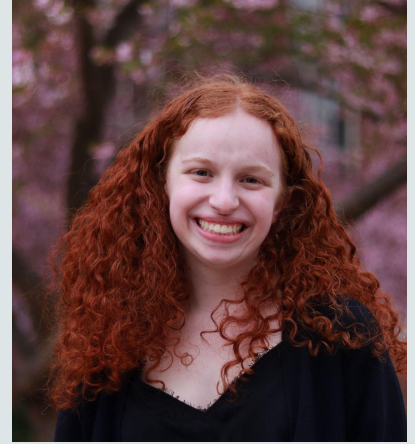- ❖ **Deputy Treasurer**

Meet Your Student Accountants

- ❖ Potter Flynn '25
- ❖ Club Sports & Visual Arts

- ❖ Lisbeth Hernandez '24
- ❖ Performing Arts & Political

- ❖ Joshua Jones '25
- ❖ Academic/Professional & Religious and Spiritual Life

- ❖ Madison King '25
- ❖ Cultural/Identity Based & Honor Societies

Meet Your Student Accountants (Part 2)

- ❖ **John Duy Nguyen '25**
- ❖ **Intercollegiate & Media/Publication**

- ❖ **Katie Nguyen '25**
- ❖ **Awareness & Hobbies and Interests**

- ❖ **Kaitlyn Yelencsics '26**
- ❖ **Community Engagement & Programming**

Budgeting Process

2023-2024 Academic Year

Budgeting Period NOW

2024-2025 Academic Year

Your Organization → CCC → SAAC Committee → Decision → Your Organization

Decision → Appeals → SAAC Committee

*Everything in red is optional

Budget Submission Process

Step 1: Select the student organization that you are the business manager of and will be submitting a budget for:

Step 2: Under the 'Money Module' drop down, select 'Accounting Book' and select the budget that you would like to submit line items for.

*Your 'Accounting Book' will look different based on the budget type that your group is eligible to submit

Step 3: Insert budget request by selecting "Create Budget Request"

*You should create a new budget request for each event/activity.

Step 4: Complete step one 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

Enter Budget Items (Step 2 / 2)

Item Type	Amount Requested	Amount Financed By Group	Total Funds Needed	Notes
Advertising	$ 20.00	$ 0	$ 20.00	Flyers to Advertise Event
Total	20.00	0.00	20.00	

+ Add item

Back

Save

Step 5: Complete step two of the 'Create/Edit a Budget Request' by:

1. Selecting your "Item Type"

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 is more than one expense for this budget item, select the "+ Add item" button to add additional line items.

4. Once all expenses have been recorded, select save.

Budgeting Exception Form DRAFT

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: After clicking 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.

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 outside of academic year

3. Specific funding policy that you need an exception to

4. Justification to warrant approval of exception request

*Exceptions must be filled out every year even if it was approved in the past
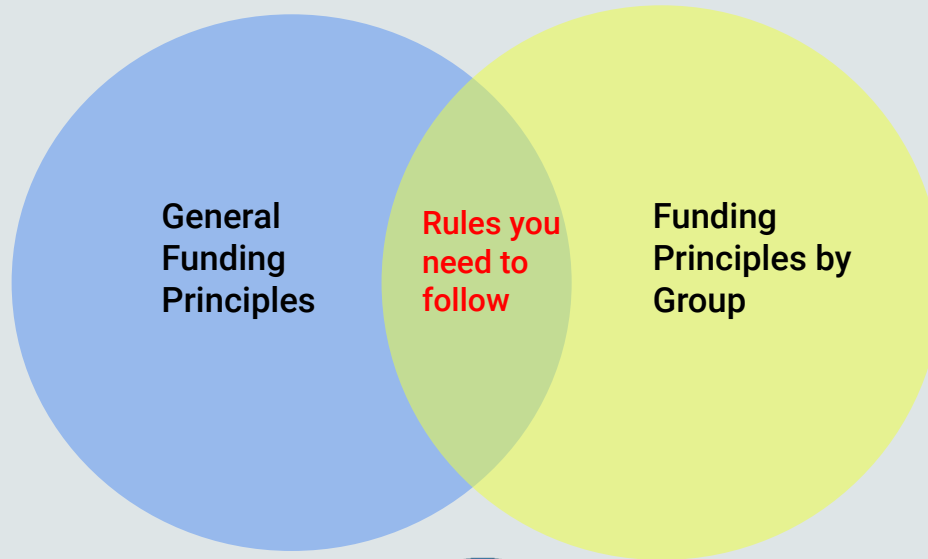
How are Budgets Evaluated?

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

Funding Principles

General Funding Guidelines
for ALL Student Organizations

- $100 will automatically be allocated for each Organization for General Interest Meetings (GIM)
- Funded activities must occur while classes are in session
- Funded activities must be registered on CCC
- Travel should be kept within a 400 mile radius of the University
- Student Organization's cannot profit from SA Funding

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**

- **Food expenses (outside of GIMs)**

- **Charitable donations**

- **Activities or items that violate University policies or federal/local laws**

Predetermined Rates

- Gas should be budgeted at $.25/mile

- Advertising materials for fundraising activities up to $25 per event

- Advertising materials for programs or events open to the entire undergraduate population up to $50 per event

- Sanitarian fee is $30 per event

Predetermined Rates

- Maximum of $500 for decorations for entire budget period
- ECM labor rates are $16.50/hour with no additional charge for standard equipment
- Printing Rates:
  - Ruth Merrill Printer: B&W $.005/imprint | Color
    - $.11/imprint
  - Copy Center: B&W $.10/imprint | Color
    - $.25/imprint
- Public safety and rental cars are no longer budgeted -> Apply for supplemental funding as needed
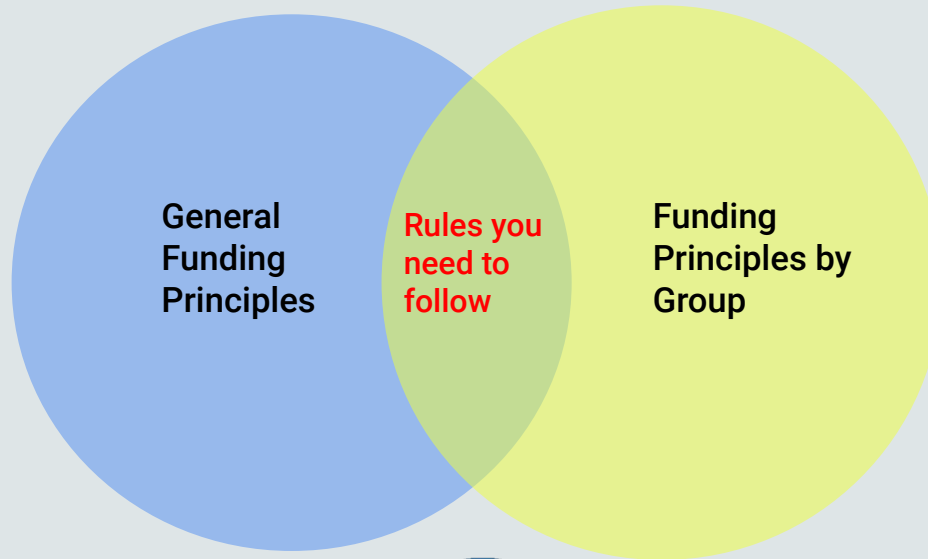
Questions?

First: Check the funding principles

Second: Reach out to your accountant

- asksaac@rochester.edu
- Marissa Carlson - mcarls11@u.rochester.edu
- Potter Flynn - pflynn5@u.rochester.edu
- Lisbeth Hernandez - lhernan9@u.rochester.edu
- Joshua Jones - jjo108@u.rochester.edu
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- John Nguyen - qnguy12@u.rochester.edu
- Katie Nguyen - lnguy22@u.rochester.edu
- Kaitlyn Yelencsics - kyelencs@u.rochester.edu