

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

# SAAC Leadership

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❖ 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

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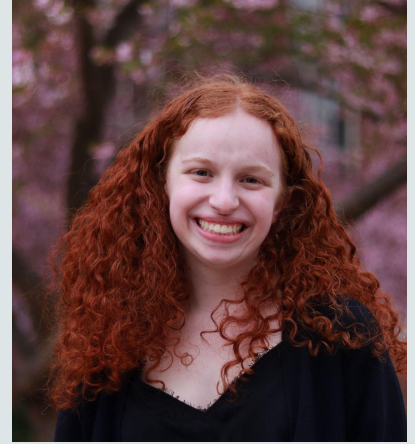
❖ **Potter Flynn '25**  
❖ **Club Sports & Visual Arts**



❖ **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)

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❖ 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



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:

The screenshot displays the CCC website interface for the Hartnett Gallery Committee. The top navigation bar includes the CCC logo, a home icon, a dropdown menu labeled 'Hartnett Gallery Committee', and an 'Events' link with a notification badge. The left sidebar lists various options: Dashboard, Activity, Settings, Officers, Group Page, Reports, Members, Emails, Events, Surveys & Forms, Website, Money, Files, and More Tools. The 'Files' option is highlighted with a red box. The main content area shows the 'Hartnett Gallery Committee' page with a 'Recently' section containing tiles for Website, Events, Surveys & Forms, Accounting Book, Tracks & Checklists, and Files. A red arrow points from the 'Hartnett Gallery Committee' dropdown menu to the 'Step 1: Select your organization' text. Another red arrow points from the 'Files' option in the sidebar to the 'Step 2: Select Money from the left side' text. The URL at the bottom is [https://ccc.rochester.edu/club\\_entry?uid=3d59eaff-aff1-11e9-a04c-0a85c36833a8\\_s=hvEao...](https://ccc.rochester.edu/club_entry?uid=3d59eaff-aff1-11e9-a04c-0a85c36833a8_s=hvEao...)



CCC

Home Hartnell College Events

GROUP SECTION

- Dashboard
- Members
- Emails
- Events 1
- Surveys & Forms
- Website
- Money**
  - Accounting Book**
  - Budgeting
  - Online Revenues
  - Refund Requests
  - Download
- Files

### Accounting Book

Budgets	Allocations/Revenues	Expenses
2022-2023 General Budget Submissions	\$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>


### Transactions (1)

Search Transactions

- Source - - Transaction Type - - Item Category - - Payment Method - - Status -

**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**

 **Budget - Wilson Commons Student Activities**

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

2022-2023 WCSA Operating Budget Filter By Wilson Commons Student Activities 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 approvers can approve/reject. No budget requests, approvals, payments can be made anymore.

**Totals**

<b>\$0.00</b> Funds Needed	<b>\$0.00</b> Requested	<b>\$0.00</b> Approved	<b>\$0.00</b> Payment Requests	<b>\$0.00</b> Payments Approved
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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.**

## 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

**Create/Edit a Budget Request (Step 1 / 2)**

\* Budget Request Type: - Select -

\* Title: General Interest Meeting

Description: 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  
Other

\* Priority: - Select -

Documents: Upload

**MORE DETAILS**


Event Location: [Text Field]


Event Start Date: [Date Field]  
Format: dd MM/yy


Event End Date: [Date Field]


\* Expected Number of Attendees: [Text Field]



 **Budgeting Exception Form** DRAFT

 Edit

 Copy Link

 Manage

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## 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**

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

# How are Budgets Evaluated?

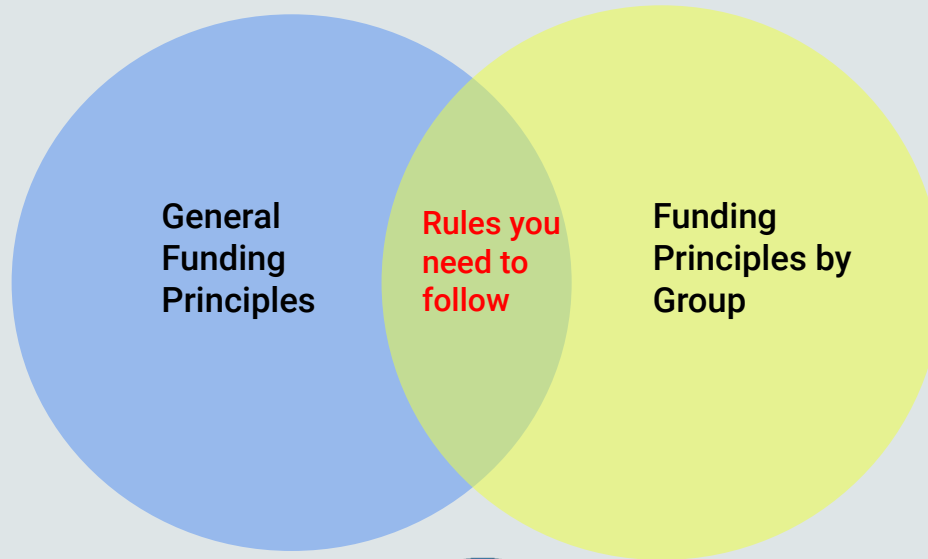
- Budgeting Guidelines
- Overall SOAR Grade
- Advisor Feedback
- Completion of Activity Reflection Forms
- SAAC Accountant Feedback
- SOFO Feedback
- Storage Assessments



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# 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



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# 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

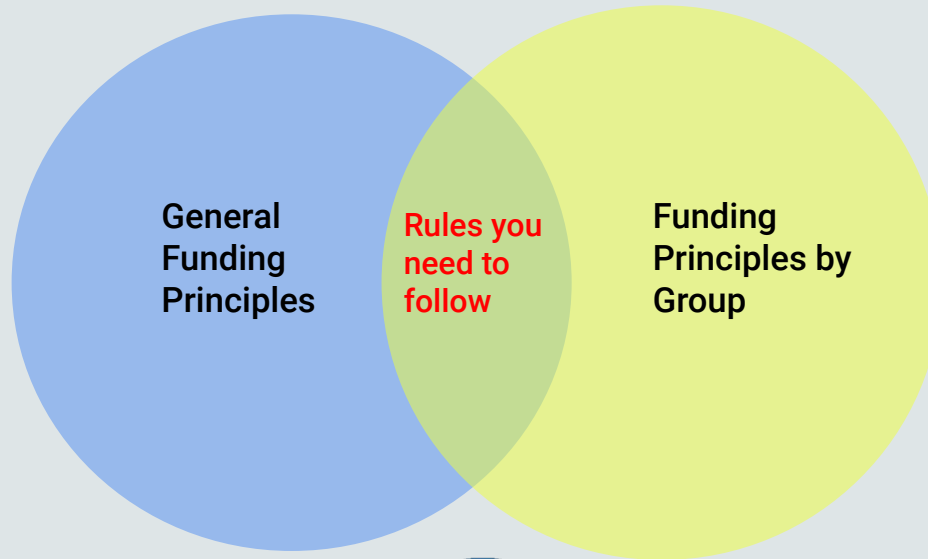


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# Predetermined Rates

- 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

# Funding Principles



# Questions?

**First:** Check the funding principles

**Second:** Reach out to your accountant

- [asksaac@rochester.edu](mailto:asksaac@rochester.edu)
- Marissa Carlson - [mcarls11@u.rochester.edu](mailto:mcarls11@u.rochester.edu)
- Potter Flynn - [pflynn5@u.rochester.edu](mailto:pflynn5@u.rochester.edu)
- Lisbeth Hernandez - [lhernan9@u.rochester.edu](mailto:lhernan9@u.rochester.edu)
- Joshua Jones - [jjo108@u.rochester.edu](mailto:jjo108@u.rochester.edu)
- Madison King - [mking38@u.rochester.edu](mailto:mking38@u.rochester.edu)
- John Nguyen - [qnguy12@u.rochester.edu](mailto:qnguy12@u.rochester.edu)
- Katie Nguyen - [Inguy22@u.rochester.edu](mailto:Inguy22@u.rochester.edu)
- Kaitlyn Yelencsics - [kyelencs@u.rochester.edu](mailto:kyelencs@u.rochester.edu)



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