

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



Steps for Business Managers

- ✓ Attend SAAC Budget Training – You're here!
- ☐ Submit Budget by Deadline
 - Budgets Open: **Friday 02/06**
 - Budget Submission: *March 4th at 9:00pm*
 - SAAC Notification of Approved Budgets to Organizations:
March 25th
 - Deadline for Student Organizations to Appeal Budget: April 1st
 - SAAC Budget Appeal Hearings: April 3rd & 7th



SAAC Leadership



❖ Tina Muller
❖ Manager of Finance



❖ Brian Magee
❖ Interim Director of Student Activities



❖ Kaitlyn Yelencsics
❖ Treasurer



❖ Anna Fang
❖ Deputy Treasurer



Meet Your Student Accountants



- ❖ Kaitlyn Yelencsics
- ❖ Governing Body
- ❖ Programming

- ❖ Anna Fang
- ❖ Intercollegiate
- ❖ Community Engagement

- ❖ Anushka Dey
- ❖ Performing Arts
- ❖ Religious & Spiritual Life

- ❖ Viveca Shreiner
- ❖ Club Sports
- ❖ Honor Society

- ❖ Ana Galic
- ❖ Cultural/Identity Based
- ❖ Media/Publication
- ❖ Visual Arts



Meet Your Student Accountants (Part 2)



- ◆ Harsh Gupta
- ◆ Academic/
Professional
- ◆ Political
- ◆ Hobbies & Interest



- ◆ Ashley Huang
- ◆ Awareness
- ◆ Cultural/Identity
Based



- ◆ Ishara Sainju
- ◆ Performing Arts
- ◆ Club Sports



- ◆ Philip Le
- ◆ Intercollegiate
Competition
- ◆ Community
Engagement



Budgeting Process

2025-2026 Academic Year

Budgeting Period NOW

2026-2027 Academic Year

Your Organization



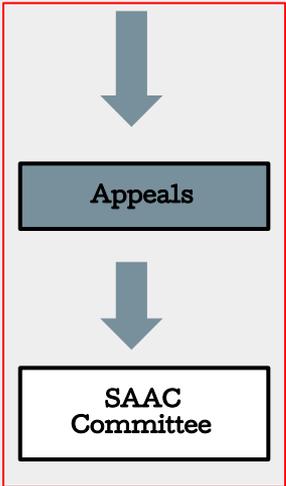
SAAC Committee



Decision



Your Organization



***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 shows the dashboard for the Hartnett Gallery Committee. The top navigation bar includes 'Home', 'Hartnett Gallery Committee', and 'Events'. A red box highlights the 'Hartnett Gallery Committee' dropdown menu in the top bar, with an arrow pointing to it and the text 'Step 1: Select your organization'. The left sidebar contains a 'GROUP SECTION' menu with items: Dashboard, Activity, Settings, Officers, Group Page, Reports, Members, Emails, Events, Surveys & Forms, Website, Money, Files, and More Tools. A red box highlights the 'Files' item in this menu, with an arrow pointing to it and the text 'Step 2: Select Money from the left side'. The main content area displays several cards for Website, Events, Surveys & Forms, Accounting Book, Tracks & Checklists, and Files, each with a 'View' button. The URL at the bottom is https://ccc.rochester.edu/club_entry?uid=3d59eaff-aff1-11e9-a04c-0a85c36833a8&s=hwEao...



The screenshot shows the CCC Accounting Book interface. The left sidebar contains a 'Money' dropdown menu with the following options: Dashboard, Members, Emails, Events (1), Surveys & Forms, Website, Money (selected), Accounting Book, Budgeting, Online Revenues, Refund Requests, Download, and Files. The main content area is titled 'Accounting Book' and displays a table of budgets. The table has three columns: Budgets, Allocations/Revenues, and Expenses. The '2022-2023 General Budget Submissions' row is highlighted with a red box. Below the table is a 'Transactions (1)' section with a search bar and several dropdown filters: - Source -, - Transaction Type -, - Item Category -, - Payment Method -, and - Status -.

| 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 |
| Total | \$3,820.00 | \$0.00 |

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

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

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 -
- Select -
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
Other

* Priority: - Select -

Documents: Upload Download

MORE DETAILS

Event Location:

Event Start Date:
Format: dd/MM/yy

Event End Date:

* Expected Number of Attendees:

| 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

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: 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 _____

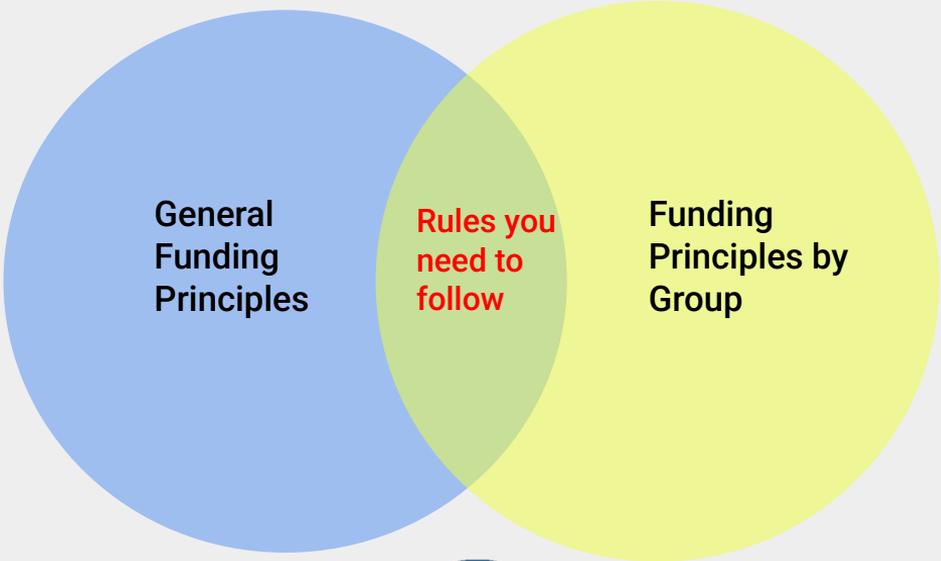
Please upload file with additional information, if

How are Budgets Evaluated?

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



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 should be budgeted according to the packages that are listed on the WCSA site
- 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 (sa.rochester.edu→SAAC→Budgeting & Supplemental → Funding Principles)

Second: Reach out to your accountant

- General inquiries: askaac@rochester.edu

| Who is your Student Accountant | |
|--------------------------------|---------------------|
| Group(s) | Accountant |
| Awareness | Anushka / Ashley |
| Academic / Professional | Harsh |
| Club Sports | Viveca / Ishara |
| Community Engagement | Anna Fang / Phillip |
| Cultural/Identity Based | Ana Galic / Ashley |
| Governing Body | Kaitlyn |
| Hobbies & Interests | Harsh |
| Honor Society | Viveca |
| Intercollegiate Competition | Anna Fang / Phillip |
| Media/Publication | Ana Galic |
| Performing Arts | Anushka / Ishara |
| Political | Harsh |
| Programming | Kaitlyn |
| Religious & Spiritual Life | Anushka |
| Visual Arts | Ana Galic |

