

SGA Budgeting Q&A Session 2023-2024

Who is eligible to submit a budget request?

- Groups that are in good standing with SLI, Student Conduct and SGA.
- Group has all required officer positions filled and an advisor
- Groups that meet all Council of Organization attendance requirements
- ► Groups that have attended an SSI Treasurer Training and SGA Budgeting Q&A
- Groups that don't practice exclusion
- Groups that have been recognized by SGA prior to the start of Spring '23 semester

If your organization is categorized as:

- Greek Letter
- > Honor Society
- Service Organization that practices exclusion

Your organization does not receive a budget from SGA, Talk to SGA Treasurer for more information or questions

Agenda



Things to Keep in Mind: Budgeting Procedures & FPPs



Example Budget



Timeline & Resources



Questions & Answers

Budgeting Timeline

3 Different Deadlines for 2023-2024 Budget Requests (next fall and next spring)

January 27

- Requesting more than \$10,000
- Required 15-minute presentation

February 24

- Requesting up to \$9,999
- Required 10-minute presentation

April 7

- Requesting up to \$1,000
- No presentation

Communicate with your members and executive board on how much you plan to request so you don't miss the spring semester deadlines.

Why a Presentation?

- ► This is new this year.
- ► With 150+ organizations Finance Committee does not know every single organization.
- Opportunity for you to tell your story and explain what your top priorities are.
- ▶ If you had an amazing year and need a significant increase opportunity to explain that.
- Finance committee can ask questions directly and not lost in emails.
- Aim to improve the transparency of the allocation process.

Please be mindful of the deadlines on the previous slide, these will be important

Finance committee will need to hear presentations for all organizations requesting more than a thousand dollars



 Important Aspects of Financial Policies and Procedures (FPPs)



CLOTHING
ITEMS/UNIFORMS THAT
ARE NOT MADE
AVAILABLE TO ALL
MEMBERS OF AN
ORGANIZATION



NEWSLETTERS FOR MEMBERS



MEMBERSHIP DUES FOR INDIVIDUAL MEMBERS OF THE ORGANIZATION TO A LARGER ORGANIZATION



MORE THAN (1) CLOSED AWARD BANQUET OR SOCIAL EVENT FOR MEMBERS ONLY



DONATIONS TO CHARITY OR OTHER SIMILAR ORGANIZATIONS



FOOD FOR EVENTS OR MEETINGS THAT ARE NOT OPEN TO ALL WCU STUDENTS



ALCOHOL

Do NOT Budget for These Items - Found in Financial Policy and Procedure (FPPs)

Important things to Keep in Mind While Budgeting



Budget Allocation from the previous year

- SSI student activity fee is the same
- There are over 150 SGA funded organizations

2

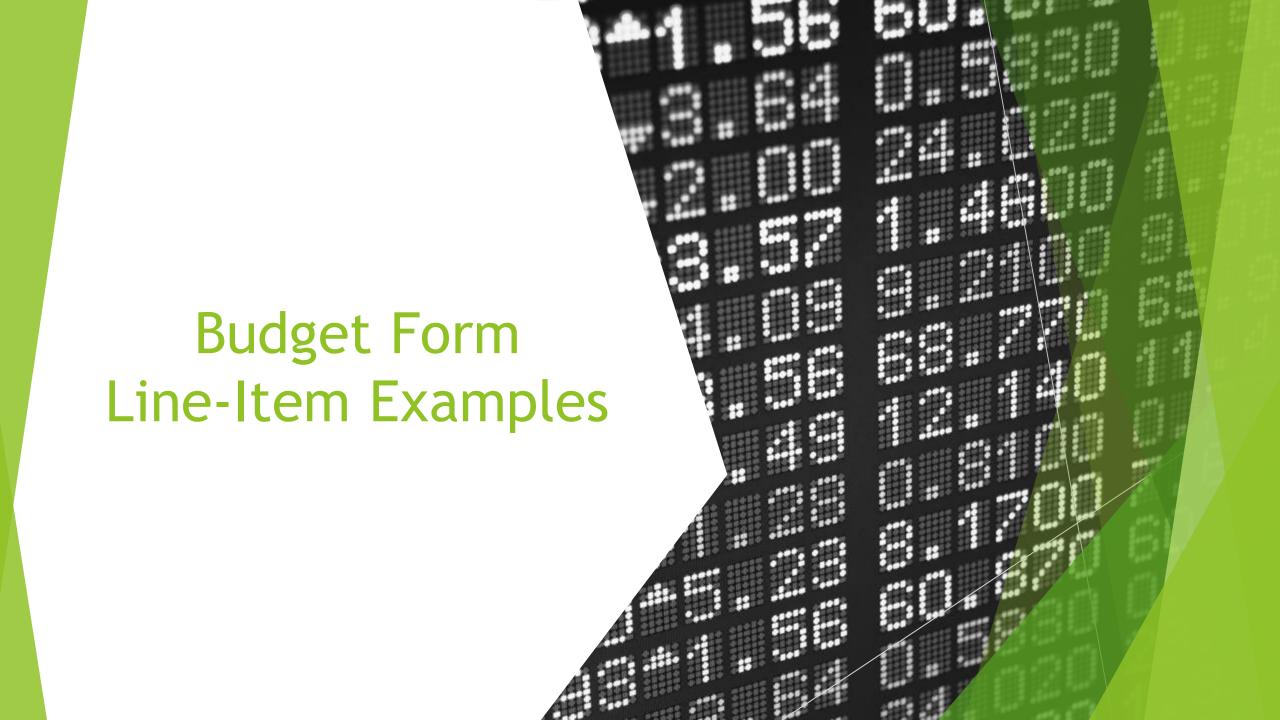
Be accurate and specific

- Accurate projected expenditures
- Specific descriptions of projected expenditures
- Use Excel!

3

Utilize the resources
Ask questions

- Financial Polices and Procedures
- SGA 2022-2023 Budgeting Seminar



Summary

Welcome student organization treasurers! SGA is excited to start the budgeting process for next academic year. As treasurer, you play an important role in the functioning of not only your organization, but the entire West Chester campus/community. While performing your responsibilities as treasurer you may feel lost from time-to-time. Fear not - Student Government Association, leadership consultants, and the faculty that work in these respective organizations are always here to help and guide you throughout the academic year.

Organization treasurers are not expected to know how to complete this budget form. Therefore, this page will act as a guide to help you successfully complete and submit this budget form to the right people by the appropriate deadline.

To the right are the deadlines which this form must be submitted and to whom this form must be submitted to. Next, are the important resources and contact information that can be used to help guide you through the budgeting process. Following the resources are explanations of each section; Feel free to reference this tab while filling out this budget form. Best of luck to you and your organization!

Resources/Contact Information

- 1. Financial Policies and Procedures (FPPs): The FPPs are the policies and procedures that dictate how student organization funding operates at West Chester University.
- 2. Finance Committee Budgeting Guidelines: The following guidelines are to be used by the SGA Finance Committee during the budgeting process. They do not govern the expenditures of student organizations, nor should they be used by student organizations to leave line-items out of their budgets. Organizations are encouraged to submit the full range of expenditures planned by the club. Due to the large amount of funds requested, certain activities must take precedence during the budgeting process. These guidelines are established by the finance committee prior to the budgeting process and are followed to ensure fair and consistent budgeting practices are maintained for all organizations.
- 3. SGA 2020-2021 Budgeting Seminar: The budgeting seminar which all SGA funded organization treasurers must attend was held in the fall semester by the SGA treasurer. The seminar explained how to appropriately fill out this budget form.

All three of the resources above are extremely helpful in successfully completing the student organization budget form. All three resource documents can be found/accessed on Student Government Association's RamConnect page.

4. Student Government Association treasurer office hours and contact information

Name: Mitchell Garber

Email: MG888315@wcupa.edu Fall 2020 zoom office hours: Monday: 1:00-4:00pm Tuesday: 1:00-4:00pm

Tuesday: 1:00-4:00pm Wednesday: 1:00-2:00pm Thursday: 1:00-4:00pm Meeting ID: 610 757 9078 Password: Mitch2020

'2019-2020 Budget' Tab

The 2019-2020 Budget tab is for viewing purposes only. In this tab all organizations that were given a budget by SGA are listed under the column "Organization:".

Submission Deadline & Details

Deadline: December 7th by 11:59pm EST
Details: 2 submissions of a completed
electronic version of this budget form are
required.

- 1) Submit a completed electronic version of this budget form to the SGA RamConnect page under "Surveys & Forms".
- 2) Submit a completed electronic version of this budget form to the SSI RamConnect page.







| 2019-2020 Student Government Association Organizations Budget Allocations | | |
|---|---------------|-----------------------------|
| Organization: | SSI Account # | 2019-2020 Budget Allocation |
| Academic & Professional: | | |
| Actuary Society of West Chester University | 734 | \$150.00 |
| Alchemists' Club | 600 | \$630.00 |
| American Marketing Association | 683 | \$2,370.00 |
| American Statistical Association | N/A | N/A |
| American Society for Microbiology of West Chester | 474 | \$1,780.00 |
| Anthropology Club of WCU | 602 | \$2,700.00 |
| Athletic Training Club | 652 | \$2,650.00 |
| Collegiate Entrepreneurship Organizaion | 697 | \$0.00 |
| Computer Science Club | 704 | \$7,500.00 |
| Criminal Justice Student Association | 653 | \$3,783.75 |
| Earth and Space Science Club | 686 | \$518.00 |
| English Club | 615 | \$1,359.92 |
| French Club | 620 | \$1,525.00 |
| History Club | 613 | \$800.00 |
| Honors Student Association | 643 | \$14,000.00 |
| Italian Club | 612 | \$850.00 |
| Japan Club | 369 | \$550.00 |
| Minorities in Medicine | 480 | \$2,190.00 |
| National Association of Black Accountants | 647 | \$1,802.50 |
| National Association of Black Journalists | 284 | \$420.00 |
| National Council for Teachers of English (NCTE) Student Affiliate | 605-05 | \$3,913.00 |
| National Student Speech Language Hearing Association | 625 | \$3,047.00 |
| Pharmaceutical Product Development Club | 427 | \$0.00 |
| Phi Delta Epsilon | N/A | N/A |
| Pre-Law Society | 241 | \$810.00 |
| Pre-Med Student Association | 720 | \$1,420.00 |

<u>Instructions</u>

This page is for viewing purposes only.

Please find your organizations 2019-2020 budget allocation and SSI Account number and place them in their respective boxes in the 'Cover Page' tab.

If your organizations allocated budget or SSI Account number is not listed on this page, type "N/A" in their respective boxes in the **'Cover Page'** tab.

West Chester University Student Government Association 2021-2022 Budget Request Form







Organization Information - Fill in all green boxes (All Required)

| Organization: | Student Government Association | | | | and SSI RamConnect page by December 7th . Instructions on how to submit this budget form can be found on the 'Start Here-Budget Guidence' tab. |
|---------------------|--------------------------------|--|------------|------------|--|
| President's Name: | Molly Scollo | WCU Email: MS917269@wc | upa.edu | | |
| Treasurer's Name: | Mitchell Garber | WCU Email: MG888315@wd | cupa.edu | | Signatures: |
| Advisor's Name: | Sara Hinkle | WCU Email: Shinkle@wcupa | a.edu | President: | Molly Scollo |
| Number of Undergra | aduate Members: 35 | SSI Account # | 703 | Treasurer: | Mitchell Garber |
| 2019-2020 Allocatio | \$31,841.42 | Please do not fill in this box 2021-2022 Request: | \$4,390.60 | Advisor: | Saxa Hinkle |

Number of undergraduate members is the number of active members in your organization. This includes members that attend weekly meetings and participate in events. This does not include non-active members who might be on your organizations email list.

Please find your organizations 2019-2020 budget allocation and SSI Account # in the "2019-2020 Budget" tab and place those numbers in their respective boxes above. If your organizations information cannot be found on the previous tab than please type "N/A" in the respective box

Reminders

Your organization must be recognized by the Student Government Association and your treasurer must have attended one treasurer training and one budgeting seminar to submit a 2021-2022 budget request.

A completed version of this budget form must be submitted to both the SGA

Operational Expenses

Operational Expenses is where you will list the expected operating expenses for your organization. For each row, place the amount of the item you are requesting, the item name, and the total amount of money needed to acquire that item (Be Specific).

Definition: An ongoing expense that must be incurred throughout the fall and spring semesters to effectively perform your responsibilities as an organization.

Examples: Food for biweekly meetings, materials/supplies for events (must list out specific materials/supplies), posters, clothing such as tshirts, etc.

Total Operational Expenses Requested: \$2,500.00 -Do not enter in an amount! This will automatically be calculated.

| Item Amount | Description of Expense | Dollar Amount |
|-------------|--|---------------|
| 200 | T-shirt for Student Body (\$10.00 per t-shirt * 200 t-shirts) | \$2,000.00 |
| 200 | Promotional SGA Pens (\$0.50 per pen * 200 pens) | \$100.00 |
| 5 | Pizza once a month for SGA meetings (\$10.00 pizza * 5 pizzas) | \$400.00 |
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Tip: Sales Tax

Student Services Inc. (SSI) is the non-profit corporation responsible for managing your organizations funds and is exempt from sales tax on most purchases. Please keep this in mind while budgeting and bring this to the attention of stores, supplies, etc., so that sales tax is not added to the purchase.

Reimbursements will not be made to anyone paying sales tax without approval from the SSI Business Office, if required by the seller. Tax emption forms are available in the SSI Business Office and online at wcustudentservices.com.

Capital Expenses

Capital Expenses is where you will list the expected capital expenses for your organization. For each item type a description of the item, the total amount of money needed to acquire the item, and how this item will benefit your organization, campus and/or student body. (Be Specific).

Definition: A physical item, software, or application that is not provided by West Chester University and will remain in your organization's possession for future use. This item should benefit your organization, campus and/or student body (Be specific).

Examples: Physical, software, or application. Check Financial Policies and Procedures document which can be found in the top of the 'Start Here-Budget Guide' tab for details on allowed budgeted technology. *Most organizations will not have capital expenses*

Total Capital Expenses Requested:

\$700.00

-Do not enter in an amount! This will automatically be calculated.

| Item # | Description of Capital Expense | Amount |
|--|--------------------------------|----------|
| 1 | Computer for the SGA office | \$700.00 |
| Please explain how this item will benefit your organization, campus and/or student body. (Be Specific) | | |
| The computer will help the SGA executive board better organize files and information to help improve | | |
| communication with organizations and promote a more organized work environment. | | |
| | | |

| Item # | Description of |
|------------|---------------------------------------|
| 4 | |
| Please exp | olain how this item will benefit your |
| | |
| | |
| | |
| | |

| Item # | Description of Capital Expense | Amount |
|------------|---|---------------------|
| 2 | | |
| Please exp | plain how this item will benefit your organization, campus and/or student | body. (Be Specific) |
| | | |

| Item # | Description of |
|------------|--------------------------------------|
| 5 | |
| Please exp | plain how this item will benefit you |
| | |

Activity Expenses

Activity Expenses is where you will list the expected activity expenses for your organization. For each planned activity first list the expenses that will be incurred. Then list the expected income from that activity. Do not manually type in totals. Totals will automatically be calculated.

Definition: Expenses: One-time expenses incurred to effectively conduct the activity. Income: Expected income generated from the activity. Examples: Food, materials/supplies for the activity (must list out specific materials/supplies), posters, giveaways such as gift cards and clothing, renting out a venue, etc.

Activity Expenses Requested for Page 1:

\$245.00

-Do not enter in an amount! This will automatically be calculated.

| Activity 1: SGA Meet the Senators Open Forum | | |
|--|---|---------------|
| Item # | Description of Activity 1 Expense | Amount |
| 1 | Food (Pizza \$100, Chips \$50, Drinks \$50) | \$200.00 |
| 2 | Supplies (Plates \$10, Cups \$15, Napkins \$10) | \$35.00 |
| 3 | Marketing (Copy Center Prints \$10) | \$10.00 |
| | | |
| | Total Expense for Activit | y 1: \$245.00 |

| Item # | Description of A |
|--------|------------------|
| | |
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| | |

| Item # | Description of Activity 1 Income | Amount |
|--------|----------------------------------|--------|
| | | |
| | | |
| | Total Income for Activity 1: | \$0.00 |

| Item # | Description of A |
|--------|------------------|
| | |
| | |

Please explain how this activity will benefit the campus and student body. (Be Specific)

This event benefits the student body because it provides students with an opportunity to voice their concerns regarding issues on campus and allows them to meet their SGA representatives.

| Please exp | lain how | this activity | will be |
|------------|----------|---------------|---------|
|------------|----------|---------------|---------|

| Total Expenses for Activity 1: | \$245.00 |
|--|----------|
| Total Income for Activity 1: | \$0.00 |
| Total Amount Requested for Activity 1: | \$245.00 |

Tota Tota

Conference Expenses

Conference Expenses is where you will list the expected conference expenses for your organization. For each planned conference, list the conference name; location; date; how this item should benefit your organization, campus and/or student body (Be specific); and a description of the conference expenses with the total amount of money these expenses will incur.

Definition: 'Conferences' pertinent to your organization which may include speaker/artist events, conferences, seminars, outings, etc.

Examples: Registration expense; travel expenses (car, bus, or plane); lodging expenses; etc.

| Total Requested for Conference Expenses: | \$945.60 -Do not enter in an amount! This will automatically be calculated. |
|--|---|
| Name of Conference 1: | Name of Conference 2: |
| Pennsylvania Board of Student Government Presidents Conference | |
| Location of Conference 1: | Location of Conference 2: |
| Kutztown, PA | |
| Date of Conference 1: | Date of Conference 2: |
| September 1, 2021 | |
| Explain how this conference will benefit your organization, campus and/or student | body. (Be Specific) Explain how this conference will benefit yo |
| The Pennsylvania Board of Student Government Presedents Conference is a conference | held annually for all |
| the PASSHE SGA's to get together and collaborate with one another. This conference w | ill be a great learning |
| experience and networking opportunity for SGA members. | |
| | |

| Item # | Description of Conference Expense | Amount |
|--------|--|----------|
| 1 | Conference registration for 5 people (\$100.00 per person) | \$500.00 |
| 2 | Hotel for two days (\$200.00 per night) | \$400.00 |
| 3 | Travel expenses (Gas \$0.38 per mile for 120 miles round trip) | \$45.60 |

| Item # | Description of C |
|--------|------------------|
| | |
| | |
| | |

Allocation Summary

Congratulations - you are nearly finished!!! The Allocation Summary is where you can view your organizations total expected operational, capital, activity, and conference expenses. Please perform one last check to ensure that all your organizations expenses are properly accounted for and the totals of each tab match the totals displayed in the allocation summary tab.

After performing a final review of your budget by ensuring all your expenses are properly accounted for and the totals are matching, you are officially ready to submit your budget to the SGA treasurer and SSI Business Office. The submission deadline and details can be found on the top-right section of the 'Start Here-Budget Guide' tab.

Do not manually change any of the totals seen below!

All totals have been automatically carried over from the previous tabs.

Operational Expenses Total: \$2,500.00

Capital Expenses Total: \$700.00

Activity Expenses Total: \$245.00

Conference Expenses Total: \$945.60

Total Budget Request for the 2021-2022 Academic Year: \$4,390.60

Budgeting Resources

The Process

1. By the Deadline
Organization Treasurer
submits budget request
on RamConnect

2. Organization Treasurer
Receives an email with link to
schedule presentation with
Finance Committee

3. Organization does presentation for Finance Committee

4. Finance
Committee
Reviews all budget
requests

5. Finance Committee Submits Budget to SGA Senate to be approved

6. SGA Senate reviews and votes on the budget submitted

7. SGA Treasurer sends Approved Budget to SSI

8. Budget reviewed by SSI Executive Director

9. Budget approved at the SSI Board of Directors June meeting

10. Final approved budget numbers sent out to all organizations



2022-2023 SGA Treasurer: Kate Spaulding

Email: SGATreasurer@wcupa.edu

Office Hours:

► Monday: 3-4:30pm

► Thursday: 12:30-4:00pm

I can work with you to find an alternative time to meet for questions if you communicate with me

