

# Student Organization Budget Training

Brought to you by Student Life & the Segregated Fee  
Allocation Committee

# Tonight

- SUFAC & its timeline
- The Student Organization Budget & SUFAC's Process
- Parts of a Student Organization Budget & Guidelines
- The Three types of Student Organization Budgets
- Reminders

# What is SUFAC?

SUFAC is the a committee of Student Government Association that handles student (SUF) money. This money is split up into *Non-Allocable* (Office/Departments) and *Allocable* (Student Org) monies.

# SUFAC Timeline

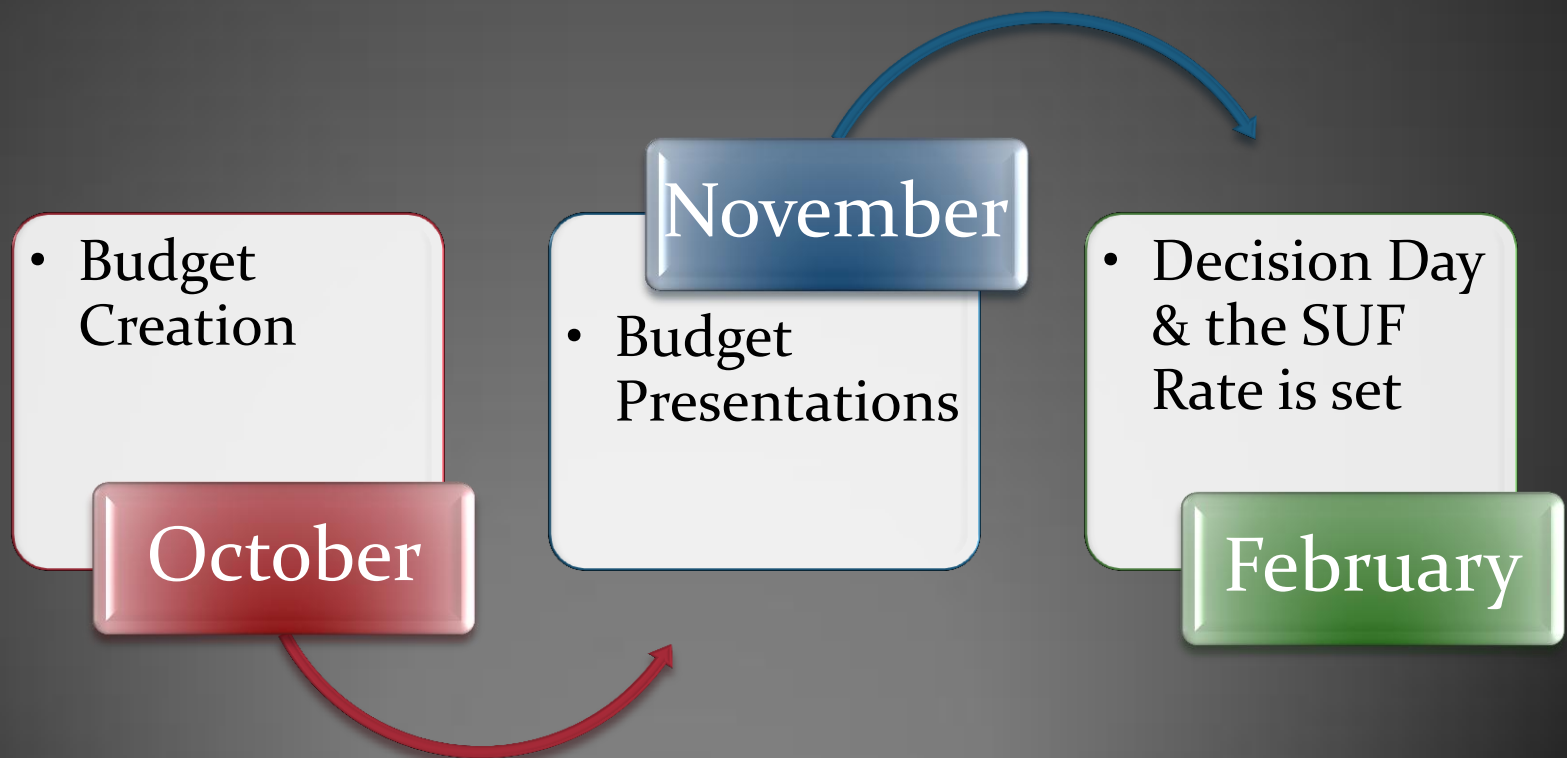
## Fall Semester

- October 13 Auxiliary Budget Presentations start
- October 14 Org Budgets are Available
- November 14 Org Budgets are due by 11:59pm
- November 17 Org Budget presentations start
- December 8 Last meeting for the Fall Semester

## Spring Semester

- January 28 First meeting of Spring Semester
- February 18 Decision Day (D-Day) & SUF Rate
- February 20 SGA Senate looks at SUF Rate
- March – April Normal Business
- May 3 Final Meeting

# The Process



# Submitting Budgets

All Budgets are due to SUFAC Via E-mail no later than  
*11:59pm on Monday, November 14<sup>th</sup>*

In Order to keep the budget process running smoothly, we cannot make any exceptions so *please* remember the deadline.

# Budget Presentations

What you Need...

- 1 copy of your budget
- A knowledgeable representative to present your budget.
- As much information pertaining to your budget as possible.
- Any physical material (handouts) that you'd like to use for your presentation must be submitted one week before your presentation.

# Presentation

- 10 minutes to explain to the board your Org Budget
- 10 minutes of questions from board members

## Decision Day

What the board does on D-Day...

- Budgets get reviewed
- Each Budget is reviewed individually and voted on individually
- Every Budget is looked at on D-Day

# The Parts of a Budget

- Committed Funds
  - Supplies & Expenses (S&E)
  - Capital Items
- Honorariums & Salaries
- Contractual Funds
- Food Funds
- Travel funds
- Additional Revenue

# Committed Funds

SUFAC will only fund up to \$2000 to any Organization for committed requests per fiscal year (July 1- June 30)

## Supplies & Expenses

- General Supplies
- Photocopying
- Duplicating (on campus)
- Subscriptions
- Memberships
- Computer Networking
  
- Requests over \$100 need to have an itemized list submitted.

## Capital Items

- Products that you want to purchase also known as Capital items
  - Camera
  - Books
  - Software
  - Promotional items
  
- New Tech will only be funded if determined critical to the org's daily function.

# Committed Form

**University of Wisconsin**  
**GREEN BAY**  
**Segregated University Fee Allocation Committee**  
**Yearly Budget Request for the 2010-2011 Fiscal Year**  
**Committed (S&E & Capital)**

**All guidelines will be followed, exceptions can be made by a 2/3rds majority.**

**Maximum Amount: \$2000.00 per fiscal year (July 1st - June 30th)**

See the Committed Guidelines located on the SUFAC Forms webpage for a listing of related guidelines

**Supplies and Expenses Worksheet**

**If S&E total is over \$100.00, please itemize on a separate sheet of paper.**

S&E Rates		SUFAC REQUEST	
Computer Fee:	\$805.00/year	General Supplies (Office Supplies)	
Photocopying Fee:	\$0.05/page - B&W	Photocopying	
Duplicating Fee:	\$0.04/page - B&W	Phone (office phone use only)	
Postage Fee:	\$0.41/page - Color - 8x11	Postage (US Postal Service charges)	
Phone Fee:	\$0.47/envelope	Duplicating (Digicopy)	
Additional fees and rates may be obtained from OFD		Subscriptions (periodicals, magazines, etc.)	
		Memberships (Local, Reg., National dues)	
		Computer (Networking Fee and Maintenance)	
		<b>I. Total S&amp;E Expense:</b>	<b>\$0.00</b>

**Capital Item Worksheet**

**Capital items have been defined as physical objects that have an expected life span of over a**

**Rank Capital Items in order of need (Capital Item 1 is the most necessary/important).**

Capital Item 1:		Expected Cost:	
Description / Reason for request:		Expected Life Span:	
		Expected Revenue:	
		Item 1 - SUFAC Cost:	\$0.00
Capital Item 2:		Expected Cost:	
Description / Reason for request:		Expected Life Span:	
		Expected Revenue:	
		Item 2 - SUFAC Cost:	\$0.00
Capital Item 3:		Expected Cost:	
Description / Reason for request:		Expected Life Span:	
		Expected Revenue:	
		Item 3 - SUFAC Cost:	\$0.00
Capital Item 4:		Expected Cost:	
Description / Reason for request:		Expected Life Span:	
		Expected Revenue:	
		Item 4 - SUFAC Cost:	\$0.00
		<b>IV. Total Capital Expense:</b>	<b>\$0.00</b>
		<b>V. Total Committed Expense:</b>	<b>\$0.00</b>

# Contractual Funds

What is considered a Contractual item?

- People, or Programs that you would like to bring to campus
- Items that you need a contract for
  - Speakers
  - Performers
  - Workshops
- SUFAC funds a maximum of \$2000 per organization per fiscal year for Contractual expenses
- Cannot be used to provide honorariums/gifts to speakers, performers, etc.
- No Academic/Credit Producing Activity
- Events Over \$1000.00 must charge community members.
- Exceptions will be considered on a case-by-case basis.
- All contracts need to go through Grant Winslow in office of student life

# Contractual Form

University of Wisconsin GREEN BAY Segregated University Fee Allocation Committee Yearly Budget Request for the 2010-2011 Fiscal Year <b>Contractual</b> All guidelines will be followed, exceptions can be made by a 2/3rds majority. <i>Maximum Amount: \$2000.00 per fiscal year (July 1st - June 30th)</i> See the Contractual Guidelines located on the SUFAC Forms webpage for a listing of related guidelines <a href="#">Contractual Worksheet</a> requests have been defined as costs for lectures, performers, films, etc., and is for non-academic and non-co <b>Rank Contractual Items in order of need (Program 1 is the most necessary/important).</b>	
Program 1: _____	
Description / Reason for request:	Expected Cost: _____
	Expected Revenue: _____
	Expected Student Attendance: _____
	Expected Non-Student Attendance: _____
	Program 1 - SUFAC Cost: \$0.00
Program 2: _____	
Description / Reason for request:	Expected Cost: _____
	Expected Revenue: _____
	Expected Student Attendance: _____
	Expected Non-Student Attendance: _____
	Program 2 - SUFAC Cost: \$0.00
Program 3: _____	
Description / Reason for request:	Expected Cost: _____
	Expected Revenue: _____
	Expected Student Attendance: _____
	Expected Non-Student Attendance: _____
	Program 3 - SUFAC Cost: \$0.00
Program 4: _____	
Description / Reason for request:	Expected Cost: _____
	Expected Revenue: _____
	Expected Student Attendance: _____
	Expected Non-Student Attendance: _____
	Program 4 - SUFAC Cost: \$0.00
Program 5: _____	
Description / Reason for request:	Expected Cost: _____
	Expected Revenue: _____
	Expected Student Attendance: _____
	Expected Non-Student Attendance: _____
	Program 5 - SUFAC Cost: \$0.00
Program 6: _____	
Description / Reason for request:	Expected Cost: _____
	Expected Revenue: _____
	Expected Student Attendance: _____
	Expected Non-Student Attendance: _____
	Program 6 - SUFAC Cost: \$0.00
<b>III. Total Contractual Expense:</b>	
	\$0.00

# Food Funds

What are the Food Fund limitations?

- All Food & Beverages funded by SUFAC must be purchased through the University Dining Service and served on campus
  - Unless the event is held in the Ecumenical Center or a food waiver has been obtained
- SUFAC will fund food of \$150.00 per semester for recruitment.
- Requests over \$150.00 must include an itemized list.
- Single Events Over \$500.00 must charge community members.
- Exceptions will be considered on a case-by-case basis.

# Food Funds

Things you may not know:

- A 'viands is offering a food donation where your food request can be matched up to a certain dollar amount
  - All registered student organizations are eligible for this type of donation. However, organizations may only apply for and receive a donation once per academic year.
  - [http://uwgreenbay.qualtrics.com/SE/?SID=SV\\_er1RGUWnv3jXPbm](http://uwgreenbay.qualtrics.com/SE/?SID=SV_er1RGUWnv3jXPbm)
- Your org can bring in up to \$50 of non-perishable food items for closed meetings (meetings intended for only members)
  - Chips, cans of soda, pretzels, cookies, ect.

# Food Form

University of Wisconsin GREEN BAY			
Segregated University Fee Allocation Committee Yearly Budget Request for the 2010-2011 Fiscal Year			
Food			
All guidelines will be followed, exceptions can be made by a 2/3rds majority.			
<i>Maximum Amount: \$1500.00 per fiscal year (July 1st - June 30th)</i>			
<i>Maximum Amount for Recruitment: \$150.00 per semester</i>			
See the Food Guidelines located on the SUFAC Forms webpage for a listing of related guidelines			
<u>Food Worksheet</u>			
Food requests have been defined as costs for food and beverages purchased under the University Food Policy, and is only for events held on campus or in the Ecumenical Center			
If a Program's Expected Food Cost is over \$150.00, please list each of the items and their cost on a Bank Food Items in order of need (Program 1 is the most necessary/important).			
Program 1:		Expected Cost:	
Description / Reason for request:		Expected Revenue:	
		Expected Student Attendance:	
		Expected Non-Student Attendance:	
		Program 1 - SUFAC Cost:	\$0.00
Program 2:		Expected Cost:	
Description / Reason for request:		Expected Revenue:	
		Expected Student Attendance:	
		Expected Non-Student Attendance:	
		Program 2 - SUFAC Cost:	\$0.00
Program 3:		Expected Cost:	
Description / Reason for request:		Expected Revenue:	
		Expected Student Attendance:	
		Expected Non-Student Attendance:	
		Program 3 - SUFAC Cost:	\$0.00
Program 4:		Expected Cost:	
Description / Reason for request:		Expected Revenue:	
		Expected Student Attendance:	
		Expected Non-Student Attendance:	
		Program 4 - SUFAC Cost:	\$0.00
Program 5:		Expected Cost:	
Description / Reason for request:		Expected Revenue:	
		Expected Student Attendance:	
		Expected Non-Student Attendance:	
		Program 5 - SUFAC Cost:	\$0.00
Program 6:		Expected Cost:	
Description / Reason for request:		Expected Revenue:	
		Expected Student Attendance:	
		Expected Non-Student Attendance:	
		Program 6 - SUFAC Cost:	\$0.00
<b>III Total Food Expense:</b>			<b>\$0.00</b>

# Travel Funds

What are the limitations on Travel funds?

- SUFAC will only fund up to \$2500 to any organization for travel per fiscal year.
- At least 1/3 of the total travel request is contributed by the Organization
- Travel funds will cover transportation, lodging, and registration for only UWGB students
- Food expenses are not covered unless it is directly covered in a registration fee
- All money granted MUST be evenly distributed to every student attending
- Check all of your prices with OFO
- SUFAC members will consider expense as well as convenience when deciding what level of funding will be allocated for lodging.
- Exceptions will be considered on a case-by-case basis.

# Travel Forms

**University of Wisconsin**  
**GREEN BAY**  
**Segregated University Fee Allocation Committee**  
**Yearly Budget Request for the 2010-2011 Fiscal Year**

## Travel Justification

**All guidelines will be followed, exceptions can be made by a 2/3rds majority.**

*Maximum Amount: \$2500.00 per fiscal year (July 1st - June 30th)*

*Up to 2/3rds of the total cost of a requested trip will be paid by SUFAC funds*

See the Travel Guidelines located on the SUFAC Forms webpage for a listing of related guidelines

### Travel Justification Worksheet

**Travel requests have been defined as costs for registration, lodging, and transportation for trips.**

**Rank Travel Requests in order of need (Trip 1 is the most necessary/important).**

#### Trip Request 1


Destination:		# of Students Traveling:	
Cost per student:	and/or	Group Entrance Registration:	
		<b>Total Registration:</b>	<b>\$0.00</b>
Number of nights:		Cost per Night:	
		<b>Total Lodging:</b>	<b>\$0.00</b>
Form of travel:	<b>Personal, Motorpool, or #</b>		
# of Vehicles:		Vehicle Rental Cost per Vehicle:	
# of Airplane Tickets:		Cost per Airplane Ticket:	
Round trip mileage:		Cost per Mile:	
		<b>Total Transportation:</b>	<b>\$0.00</b>
Description / Reason for request:		Total Trip Cost:	\$0.00
		Org Contribution (at least 1/3rd):	\$0.00
		Org % Contribution:	0%
		<b>SUFAC Contribution:</b>	<b>\$0.00</b>

#### Trip Request 2

Destination:		# of Students Traveling:	
Cost per student:	and/or	Group Entrance Registration:	
		<b>Total Registration:</b>	<b>\$0.00</b>
Number of nights:		Cost per Night:	
		<b>Total Lodging:</b>	<b>\$0.00</b>
Form of travel:	<b>Personal, Motorpool, or #</b>		
# of Vehicles:		Vehicle Rental Cost per Vehicle:	
# of Airplane Tickets:		Cost per Airplane Ticket:	
Round trip mileage:		Cost per Mile:	
		<b>Total Transportation:</b>	<b>\$0.00</b>
Description / Reason for request:		Total Trip Cost:	\$0.00
		Org Contribution (at least 1/3rd):	\$0.00
		Org % Contribution:	0%
		<b>SUFAC Contribution:</b>	<b>\$0.00</b>

## Rank Your Requests!

- Please make sure that all your Committed, Contractual, Food, and Travel Request are ranked in order of preference.
  - So if you are requesting five contractual speakers:
    - **Program One** should be the most important presenter your org wants to bring to campus
    - **Program Five** should be the least important presenter you are asking to bring to campus



Short, Sweet, and to  
the Point!

- Please limit your descriptions to 4 or 5 lines
- Make sure your **whole** description is visible in the description box
- If you feel your explanation needs to be longer than 4 or 5 lines, please attach a separate document

# Revenue

What is Revenue and what does it have to do with your Agency Account?

- Revenue is money that an organization makes through an event that is funded with SUFAC money.
- All revenue is expected to be used to pay back SUFAC, up to the amount that was used for that event.
- Revenue is used to offset the total Budget Request
  - For Example: If you claim that you expect to make \$2000, off a \$3000 event, and make \$4000, you are still expected to pay SUFAC back \$3000, and you get to keep the extra \$1000.

# Revenue Form

<b>University of Wisconsin GREEN BAY</b> Segregated University Fee Allocation Committee Yearly Budget Request for the 2010-2011 Fiscal Year <b>Revenues &amp; Summary</b> All guidelines will be followed, exceptions can be made by a 2/3rds majority.	
<u>Revenue Worksheet</u>	
<b>Revenue has been defined as any monetary income that is collected from Segregated Fee funded events,            Revenue must be paid back to SUFAC up to the amount of money that SUFAC funded the event for</b>	
<u>Revenue Summary</u>	
Committed:	\$0.00
Contractual:	\$0.00
Food:	\$0.00
Org Contribution for Trips:	\$0.00
Additional Items: (Please Specify)	
Additional Items: (Please Specify)	
Additional Items: (Please Specify)	
Total Revenue:	\$0.00
<u>Cost Summary</u>	
Committed:	\$0.00
Honarium & Salaries:	\$0.00
Contractual:	\$0.00
Food:	\$0.00
SUFAC Contribution for Trips:	\$0.00
Total Cost:	\$0.00
Total Allocation:	\$0.00

# Three Types of Student Organization Budgets

Large Budgets Request

Medium Budget Request

Small Budget Request

# Large Budget

- Budgets that request a \$2500 or more
- Organizations with budgets of a \$2500 or more must send a representative to present to the Board at a SUFAC meeting.

# Medium Budgets

- Medium Budgets are less than \$2500 but more than \$500.
- These budgets potentially could be required to present to the board upon the request of the Chair & Vice Chair.
- If the org still wishes to present to the SUFAC Board, they can make the request in writing upon submission of their budget.

# Small Budget Requests

- Small Budgets are less than \$500.
- These budgets will be decided on by the Chair and Vice Chair.
- An EZ Budget is a budget of a \$100 for S&E.
- All other requests must be submitted with the Yearly Org Budget Form.

## Forms & Guidelines

Where do you find all the forms needed for your budget?

- All SUFAC forms & guidelines are located on the SGA website, under Committees, then under the Segregated Fees & Allocation, and then under Forms.
  - <http://www.uwgb.edu/studgov/committees/sufac/forms.asp>
  - <http://www.uwgb.edu/students/>

## Email and Saving

- Please email all completed budgets to the SUFAC account with Name of Org's Budget in the subject line
  - Examples:
    - SUFAC Budget
    - SUFAC 12-13 Budget
- Please make sure when you save your budget you include the name of your org.
  - Example:
    - SUFACbudget.xls

# Reminders

**Budgets are Due by 11:59 pm on Monday  
November 14<sup>th</sup>**

Also all physical & digital material that will be presented to the board during SUFAC meetings must be submitted to SUFAC at least one week before the presentation will take place

# Questions:

- Please contact us with any question that you may have at any time. If you need additional help we are always available during our office hours and willing to make appointments if necessary.
- E-Mail: [sosufac@uwgb.edu](mailto:sosufac@uwgb.edu)
- Office: In the student organization suite

