STUDENT ASSOCIATION BUDGET WORKSHOP

Please sign in at the front of the room
Welcome

- **SA Treasurer**: Marc Calvey
- **SA Deputy Treasurer**: Anthony Baca
- **SA Accountant**: Marzena Szmydt
- **SA Advisor**: Jill Zambito

**INTRODUCTIONS**

**Reason you are here:**

- obtain a better understanding of the SA Finance Policy
- submit a properly prepared budget request for the next fiscal year
Budget Process

In a nutshell...

• Complete the online budget request form

• Submit the request form online by Friday, October 2nd by 11:55pm.

• Wait for SA to email your org to set up a budget presentation date.

• Budget presentations.

• Sub-Committees & Senate
WHO IS ELIGIBLE FOR FUNDING?

REQUIREMENTS

• Any organization that has been officially recognized by the SA Senate for at least 2 calendar years as of the date budget requests are due.

• If organization is inactive for 1 year or more, they must go through the recognition process all over again in order to be eligible for funding.

• Organization must attend at least one Budget Workshop Presentation to be eligible for funding.
Create New Request

Select a Process or Budget to Start Your Request

PROCESS:
Marc's Test
Fy 17 Budget Request

BUDGET:
Fy 17 Budget request
Please be as accurate and detailed as possible

Click Here
Request

* Request Title
Name of your organization

Description
To propose our budget for the 2017 Fiscal year
BUDGET: Fy 17 Budget request

Request

Name of your organization

What is the name of the organization you are filling the request on behalf of?

Name of organization

* Do you understand the President and Treasurer must have attended one (1) Budget workshop meeting to be eligible to receive funds

  ○ yes
  ○ no

* Has your organization been recognized by the Student Association for at least 2 years?

  ○ yes
  ○ no
* Does your organization have restrictive membership?

- [ ] yes
- [x] no

* Have you read the SA financial policy?


- [x] yes
- [ ] no
Name of your organization

* Do you understand for every day the budget submission is late, the organization will forfeit 5% of their allocation. (max 14 days late before you forfeit all allocation)

- yes
- no

How many active members did they have last year? (FY15)

10

* How many active members does your organization have this year? (FY16)

30

* Does your organization receive outside funding from somewhere other then the SA? If yes, where?

no
* Is there an increase in your budget request compared to last year, if yes why?

Yes, because....

* How do you plan to collaborate with other organizations/departments this year?

Yes, we plan to do....
Used instead of having documents notarized

**Name of your organization**

* By Accepting this, you agree that you have the permission of the Adviser, President, and Treasurer of your organization to submit this proposed budget.

- [ ] Accept (all aforementioned people agree to everything contained within our budget)
- [ ] Decline (I understand my budget requires their approval and will not submit it at this time)

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* Do you understand this is not the approval for you Fy17 allocation. The approval of your proposal only means that you have met the minimum requirements to be eligible to receive SA funding, Approvals for allocation will be released in the spring semester.

- [ ] Yes
- [ ] No

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**VERY IMPORTANT**
# Name of your organization

## Requested Total
- Total: $0.00

## Reviewer Adjusted Total
- Total: $0.00

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**BUDGET SECTION:**

What is the event and what is the purpose of the event

- Event 1
What is the event and what is the purpose of the event

Event 1

+ Add Item

Another "Event 1" Section

Event 2

+ Add Item

Another "Event 2" Section

Event 3

+ Add Item

Another "Event 3" Section

Event 4

+ Add Item
MUST BE USED FIRST

* Line Item Category

- Name of Event (Expense)
- Guest speaker, musician, etc... (Expense)
- Registration (Expense)
- Catering (Expense)
- Travel (Expense)
- Food (Expense)
- Shirts (Expense)
- Miscellaneous (Expense)

* Quantity
1

* Cost

$[

Total
$

Cost must be a valid integer.
Name of Event (Expense): National Retreat

Description:
The purpose of this event is to collaborate with other organizations like us in an effort to grow on campus.

Quantity: 1
Cost: $500.00
Total: $500.00
New Line Item

* Line Item Category
Shirts (Expense)

* Name
Recruitment Shirts

Description
We want to purchase shirts so that we can promote our organization on campus

* Quantity
150

* Cost
$17.95

Total
$2,692.50
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BUDGET SECTION:

What is the event and what is the purpose of the event

**Event 1**

1. **Recruitment Shirts**  
   Shirts  
   150 x $17.95  
   $2,692.50

[Add Item]
New Line Item

* Line Item Category
Food (Expense)

* Name
Papa John's Pizza

Description
We are having an event and want to provide pizza for those that attend

* Quantity
12

* Cost
$9.99

Total
$119.88

[Save]
### Requested Total

$2,812.38

### Reviewer Adjusted Total

$2,812.38

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**BUDGET SECTION:**

**What is the event and what is the purpose of the event**

#### Event 1

1. [Recruitment Shirts](#)  
   - Shirts  
   - 150 x $17.95  
   - $2,692.50

2. [Papa John's Pizza](#)  
   - Food  
   - 12 x $9.99  
   - $119.88

[Add Item]
If you do not hit submit your request will not be processed
General Policy

• What you can spend your allocation on and the proper way to submit it.
Expenditures

• Refer to Article IV Use of SA funding section 2
• All expenditures must be **pre-approved** and expenditure forms must be submitted to the SA **prior** to any and all purchases.
• NIU Advisor and the organization’s President and Treasurer must sign the SA Expenditure form.
• Any purchases or obligating money for services or items that have not been approved will leave the individuals personally responsible for covering those expenses.
Purchasing

• May be used for the financial needs of an organization to exist, program, operate, function, expand, including but not limited to conferences, competitions, concerts, events, and promotions.
  – Administrative items (mail, flyers, phones, faxes)
  – Conference expenses (lodging, food, registration)
Can be found in the front of Campus Life Building 180 or online
Form is only valid with 3 signatures (President, Treasurer, and Advisor)

The following items need to be turned in with this form:

1. Two quotes for Purchase Order and W-9 Form* (For Hotels, T-shirts, Restaurants, etc.)
2. Independent Contractor Form and W-9 Form* (For Guest Speakers, DJs, Comedians, etc.)
   Contracts must be signed and processed by Jill Zambito, Director of SII.D.
3. For hotels that accept credit cards - Credit Card Authorization Form needed.

*If vendor does not have a signed copy of W-9 we can provide a blank copy to be filled and signed.*

ALL FORMS MUST BE COMPLETED IN ORDER FOR REQUEST TO BE PROCESSED.

Signatures below verify that all parties involved are in agreement with the information provided on this form. We agree that we have read and understand all rules, procedures and policies regarding the NIU Finance Policy. Additionally, we affirm that the requested expenditure was allocated in our FY16 Budget (Fall 2015-Spring 2016). In the event that signatures cannot be gathered by all parties listed below and the request is needed to be rushed, an email must be sent to the SA Treasurer for his approval from the members who were unable to sign the form.

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President’s Name  Signature  Date

Treasurer’s Name  Signature  Date

Advisor’s Name  Signature  Date

Contact person:
Name ___________________________ Phone: ___________________________

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Student Association Treasurer

Amount Approved:___________  Date:___________

Signature: ___________________________

Marc Calvey
FORM: SA-OE15
QUESTIONS?

Our door is always open
CONTACT INFO

SA TREASURER
Marc Calvey
815-753-1617
mcalvey1@niu.edu

ACCOUNTANT
Marzena Szmydt
815-753-5204
mszmydt@niu.edu