HOW THE BUDGET PROCESS WORKS

Just to clarify, the Budget Committee consists of the Executive Board of the SBA (President, Vice President, Secretary, and Treasurer), and the Treasurers of each class. The chair of the Budget Committee is the SBA Executive Board Treasurer (Allison Lyons for the 2012-2013 school year). The Budget Committee reviews budget requests submitted by student organizations and then submits its recommendations to the Board of Governors for approval. The Board of Governors consists of all the student representatives from each of the student organizations.

HOW THE BUDGET PROCESS WORKS – IN GENERAL:

Every year, each organization is given the option of submitting a preliminary budget request. This usually occurs during the summer preceding the fiscal year. Preliminary budget requests are not required (though highly recommended) and all organizations are allowed to submit supplemental budget requests during the school year. The Budget Committee reviews the preliminary and supplemental budget requests and votes on the amounts they would like to approve. These allocations are then submitted to the Board of Governors for the final vote on the allocations for each organization. Following the Board of Governors vote any necessary adjustments are made, the budgets are returned to the organizations, and the allotments are posted to the respective organization’s account.

You must submit supplemental budget requests before your respective event has occurred. Supplemental budget requests that are submitted after your event has occurred are very unlikely to receive allocations.

Funds distributed by SBA to student organizations must be used for approved purposes only. For example, funds allotted for food may only be used for food and plates/utensils, not other supplies (such as signs or decorations). Failure to do so may cause issues with reimbursement.

PRELIMINARY BUDGET REQUEST PROCESS – IN DETAIL:

Prior to August 1st, 2012 you may submit a preliminary budget request in attempt to obtain funding for events from the SBA.

Steps for Submitting a Preliminary Budget Request:

1. Fill out a preliminary budget request form for each event. This form can be obtained either online or by emailing Allison Lyons at aclyons@my.okcu.edu. (A copy of the form has been attached in this email).
2. Turn in the form to Allison on or before Wednesday, August 1st, 2012 at 5:00 p.m. Please submit the form via email to aclyons@my.okcu.edu with your organization’s name and “Preliminary Budget Request” in the subject line.
3. After turning in the preliminary budget request to Allison, the Budget Committee will review the request and make a recommendation as to the amount that they think is appropriate to allot.

4. After the Budget Committee has made its recommendation, your request will be brought before the Board of Governors at the first Budget Meeting for final approval. The Board of Governors has the option of approving the full amount you requested, the amount the Budget Committee recommends, or none of the amount you requested.

5. Following the Board of Governors vote, your allotment (if you received one) will be posted to your student organization’s account.

SUPPLEMENTAL BUDGET REQUEST PROCESS – IN DETAIL:

**Prior to an event’s occurrence**, you may submit a supplemental budget request to request funding for the event from the SBA. If you submit a request for funding after the event occurs, the Budget Committee will recommend that you receive zero funds for the event.

You may not spend funds related to a supplemental budget request until the funds are approved by the SBA Board of Governors. If you spend funds prior to the Board’s approval, **you will not be reimbursed**.

**Steps for Submitting a Supplemental Budget Request:**

1. Fill out a supplemental budget request form. An electronic copy of this form can be obtained either online or by emailing Allison Lyons at aclyons@my.okcu.edu. A hard copy of the form has been included in this packet. Hard copies are also available in the Dean’s Office.

2. Turn in the form to Allison before the Monday preceding the next SBA Budget Meeting. Allison will send out an email designating when she will start accepting forms and when they are due prior to each meeting. These meetings generally occur in one month increments. The first SBA Budget Meeting will be held on Monday, September 10th, 2012.

3. After turning the supplemental budget request into Allison, the Budget Committee will review the request and make a recommendation as to the amount that they think is appropriate to allot.

4. After the Budget Committee has made its recommendation, your request will be brought before the Board of Governors at the Budget Meeting for final approval. The Board of Governors has the option of approving the full amount you requested, the amount the Budget Committee recommends, or none of the amount you requested.

5. Following the Board of Governors vote, your allotment (if you received one) will be posted to your student organization’s account. You should receive an email confirming whether funds were approved.
Steps for getting reimbursed following a Supplemental Budget Allotment:

1. OCU utilizes a receipt system for the student organization budgets. This means that you must spend the money for the event using personal or organizational means before you can be reimbursed using the SBA allotment in your account. To get reimbursed:
   a. Obtain a reimbursement form from the Dean’s Office.
   i. If using funds allotted by SBA, you will also need to fill out an additional form to confirm that SBA has allotted funds for your event. This form is also available at the Dean’s Office.
   b. Fill out the form and attach your receipt.
   c. Have the organization President or Treasurer sign the form.
   d. Return the form to the Dean’s Office.
   e. The Dean’s Office will give you your reimbursement! This may take a couple of days depending on how much you are being reimbursed.
2. Any money that you do not utilize out of your allotment will roll back into the SBA General Account at the end of each semester.

Summary Timeline of Supplemental Budget Request Process

1. Complete Supplemental Budget Request Form and obtain supporting documentation for all funds requested.
2. Submit SBR Form and supporting documentation to aclyons@my.okcu.edu by 5:00pm on the Monday preceding the next SBA Board of Governors budget meeting.
3. The Budget Committee meets to determine what funds it will recommend for Board approval.
4. The Board of Governors meets to discuss requests and votes on amounts to be approved.
5. Treasurers and/or Presidents are notified re whether funds were approved by the Board.
6. Event occurs/expenditures are made.
7. Complete Reimbursement Form and SBA Verification Form and turn in forms to the Dean’s Office with receipt(s).
8. Pam Ray (in the Dean’s Office) reviews forms and verifies that funds were approved by SBA.
9. You get reimbursed!
GETTING REIMBURSED USING FUNDS RAISED BY YOUR ORGANIZATION

Any funds that your organization raises on its own may be used for anything your organization chooses.

To get reimbursed using funds raised by your organization, complete the Reimbursement Form (available in the Dean’s Office) and turn in the form to the Dean’s Office. Pam Ray will process the form and adjust your organization’s account accordingly. You will receive a reimbursement soon after.

Note: To deposit funds raised by your organization, turn in the money to the Dean’s Office. You should receive a receipt for your records.

STEPS FOR GETTING YOUR PCDC CO-SPONSORSHIP REWARD:

1. If you co-sponsored an event with PCDC, you must submit your PCDC Co-Sponsorship Verification form with 30 days of the event’s occurrence in order to receive your $250.00 reward.
2. Fill out the verification form.
3. Obtain the signature of one of the people listed on the form.
4. Submit the form to the Budget Committee via Alisha.
5. The reward will be brought before the SBA Board of Governors for final Approval.
6. If approved, the $250.00 will be posted to your account. Because this $250.00 functions as an award, it can be spent on whatever you like.

This process can be a little confusing when being put into action for the first time, so please don’t hesitate to ask Allison or Zeb questions!
BUDGET REQUESTS:
HOW TO SATISFY THE DOCUMENTATION REQUIREMENT

As a general rule, the more detailed of a breakdown you are able to provide for your event, the more likely it is that your request will be viewed with legitimacy and we will be able to sufficiently consider the amount you are requesting. If you have any questions please feel free to contact Allison Lyons.

Guest Speaker, Artists, or other Professional Consultant Fees:
1. Who is your guest speaker, artist, or professional consultant?
   - Please provide a business card, biography, website, or some other material that will identify this person.
2. How will this guest speaker, artist, or professional consultant benefit the student audience being targeted?
   - Tell us in your own words how this event will be beneficial.
3. How much will this event cost?
   - Please provide a receipt from the previous year (if it’s a continuing event) or a price quote.
4. How will your guest speaker, artist, or professional consultant be traveling (you can include this cost under this category or the “Travel, Lodging, and Registration” category)?
   - If this person is coming from out-of-town, let us know where they are coming from so that we know whether the amount you are requesting is justifiable. If they are driving in, let us know how many miles they will be traveling and how much gas will cost. If they are flying in, let us know where they are coming from and provide us with a quote for their ticket price.

Travel, Lodging, and Registration
1. How many students are going?
   - Keep in mind that the Budget Committee can only approve funds for up to two organization members to travel, but the Board of Governors are at liberty to approve more.
2. Where are you going and why?
   - Please provide proof of where you are going (brochures, website printout, flyers, etc.)
   - Tell us in your own words how this event will benefit your targeted student audience.
3. For travel, we need to know what the method of travel is and how much it will cost.
   - Please provide a price quote. A quote printed out from an online travel site (Travelocity, Expedia, etc.) will usually suffice.
4. For lodging, we need to know how many nights you will be staying, and how many rooms are needed.
   - Generally, the SBA Budget Committee will only allot funding for one room if the students are of the same sex, and two rooms for two students of the opposite sex.
5. For registration, we need to know the cost.
   - Please provide documentation of the cost (receipt, brochure, flyer, etc.).
Postage, Mailing, and Publicity
1. We need price quotes for this category.
   - Please provide documentation of the cost (receipt, brochure, flyer, etc.).
   - Because of the increasing convenience of email, the Budget Committee is unlikely to approve funds for this category unless it is for some special occasion. Please be very detailed in your explanation of why you need to utilize paper documents.

Copy Expense
1. We need price quotes for this category.
   - Please provide documentation of the cost (receipt, brochure, flyer, etc.).
   - Because most organizations communicate via email, the Budget Committee is unlikely to approve funds for this category unless it is for some special occasion. Please be very detailed in your explanation of why you need to utilize paper copies.

Supplies and Materials
1. What supplies and materials are you purchasing?
   - In your own words.
2. Why do you need the supplies and materials?
   - In your own words.
3. How much will it cost?
   - Please provide documentation of the cost (receipt, brochure, flyer, etc.).

Food
1. Where are you getting the food from?
   - In your own words.
2. What is the food for/why is it necessary?
   - In your own words
3. How much will the food cost?
   - Please provide documentation of the cost (receipt, brochure, flyer, etc.).
   - SBA does not cover the cost of food for trips that student organization members take.
   - SBA does not cover the cost of food for general meetings beyond the automatic $300.00 or $600.00 allotment.

Equipment
1. Where is the equipment from?
   - In your own words.
2. What is it for/why do you need it?
   - In your own words.
3. How much will it cost?
   - Please provide documentation of the cost (receipt, brochure, flyer, etc.)

Other
1. What is the "other"?
2. Why do you need it?
3. How much will it cost?
   - Please provide documentation of the cost (receipt, brochure, flyer, etc.)
SUPPLEMENTAL BUDGET REQUEST FORM 2012-2013

Name of your organization:

Name of the event:

Is this a continuing event or a new event?

Will this event be held in the Fall Semester or the Spring Semester?

How many students will be attending the event?

Who will this event benefit?

Please provide any explanation of your event, a breakdown of the costs, and a price quote (by attaching the appropriate documentation if necessary)!

### Expenditures for Event:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount Requested</th>
<th>Amount Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest Speaker, Artist, Prof. Consultant</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Travel</td>
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<td>$0</td>
</tr>
<tr>
<td>Postage, Mailing, Publicity</td>
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<td>$0</td>
</tr>
<tr>
<td>Copy Expense</td>
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<td>$0</td>
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<tr>
<td>Supplies &amp; Materials</td>
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</tr>
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<td>Equipment</td>
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</tr>
<tr>
<td>Other</td>
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<td>$0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Please return this form and any supporting documentation to the Budget Committee by the specified date. Forms can be turned into Allison Lyons at aclyons@my.okcu.edu. In the subject line of your email, please enter your organization’s name and “Supplemental Budget Request.”
PCDC CO-SPONSORSHIP VERIFICATION FORM TO OBTAIN REWARD 2012-2013

This form must be submitted to the SBA Budget Committee within 30 days of the event’s occurrence in order to be considered.

Name of Organization:

Event Name:

Date Event was Held:

PCDC Verification Signature:

(Josh Snavely, Debbie Boles, Laurie Jones, Jennifer Lippe, or Carol North)

SBA Verification Signature:

(Zeb Judd or Allison Lyons)