

CampusGroups Budgeting Guide

Budgeting for Club Treasurers

Budgets are the most critical document for an organization's financial head (eg. Treasurer, VP of Finance). This document tracks estimated revenues and expenditures and compares it to actual revenues and spending. Having a document and using it to keep track of spending allows your club to be successful financially.

CampusGroups makes budgeting easy and clearly shows anticipated and actual revenues and expenses to allow groups to see a global view of their finances.

Budgeting in CampusGroups

There are three types of budgets you might use in CampusGroups:

- Main Mass Funding Budget
- Rolling Funding Budget
- Club Fund Budget

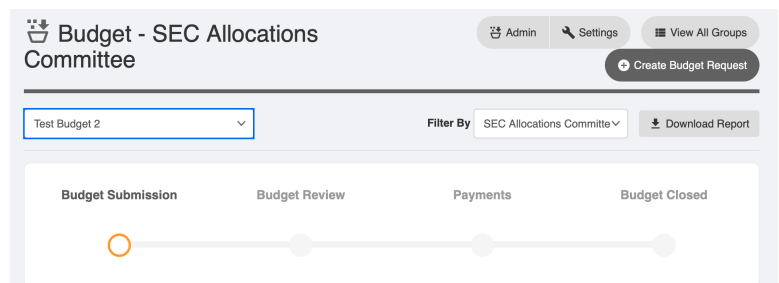
Regardless of the budget type, each has a budget form that is the same. Depending on your group, not all of the above mentioned budgets will necessarily apply to your group. **Only officers are able to use the budgeting tools.**

Accessing Budgeting Tools

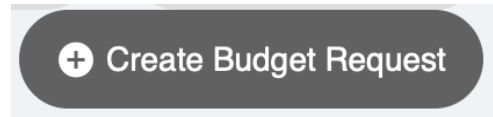
1. Log in to community.case.edu with CWRU SSO.
2. Navigate to your group page by clicking the group tile under "My Groups" on the homepage, or using the "Groups" dropdown on the top menu bar.
3. On the left sidebar/officer tools menu, select **Money**, then **Budgeting**.

Selecting a Budget

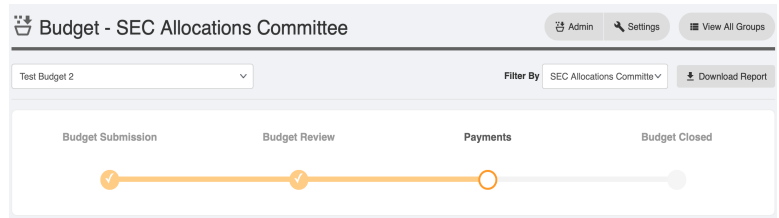
Next, you will need to select the appropriate budget from the dropdown menu on the left. The dropdown shows a complete listing of budgets on the platform. Some of these budgets may not appear for you or apply to you, so select the one that is most appropriate for your needs.



If the budget period is accepting submissions, it will be in the **Budget Submission** stage and you will see a **Create Budget Request** button at the top right of the page. Click this button to begin the process.



If the budget you are attempting to submit to is **not** in the Budget Submission stage, you will not see the Create Budget Request button and will not be able to submit a request. To the right is an example of a budget that is not taking submissions, as it is in the payments stage.



Tip: Be on Time!

Make sure you submit your budget requests within the time period specified by your board's VP of Finance. **Late submissions will most likely be denied** since VPs do not have direct access to change the budget stages.



Creating a Budget Request

You have now reached the most important part of the process: creating the request. The next series of pages details step-by-step instructions for success. You will need to create a new budget for each event/purchase. There is no option for bulk submission.

Step 1: Budget Request Type

The first step is selecting a budget request type. These event types are global for the university, so consult with your board's VP of Finance or your funding guidelines to choose the most appropriate category.

For this example, we will choose **Event - Social (Large - 100+)**. After selecting a **Budget Request Type**, enter the **Title** of the event, **Description** and **Priority*** (low, medium, high).

5 Create/Edit a Budget Request (Step 1 / 2)

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Priority is for the budget request's priority to your group relative to other requests, not for your board as a whole. **It is strongly discouraged to make every event's priority high. Each recognizing organization may have their own rules or guidelines about priority.*

The next section asks for **Location**, **Date**, and **Expected Number of Attendees**. Here is an example of this completed step:

👤 Create/Edit a Budget Request (Step 1 / 2)
✕

* Budget Request Type ▼

Event - Social (Large - 100+)

* Title

Flagship Event

Description

Our Flagship event is designed to help students de-stress during midterms. We do this by purchasing Mitchell's Ice Cream, bringing therapy dogs, and partnering with University Health and Counseling Services. It is important for us to hold this event because everyone is stressed during midterms and this is a way to support student's mental health.

Long text, no limit

Priority ▼

high

MORE DETAILS FOR EVENTS

Location

Tinkham Veale University Center

Start date

15 Mar 2019

Format: dd mmm yyyy

End date

15 Mar 2019

Format: dd mmm yyyy

Expected Number of Attendees

300

Numbers only, no decimals

Close
Next

Step 2: Budget Information

After completing Step 1, the actual budget information is entered in Step 2. New lines can be added with the **Add Item** button and a more detailed description can be entered in the notes box. Example below:

👤 Enter Budget Items (Step 2 / 2)
✕

Item Type	Amount Requested	Amount Financed By Group	Total Funds Needed	Notes	
Services/Contracts - Per▼	\$ 300	\$ 0	\$ 300	Dogs for 3 hours	✕
Rental - Space ▼	\$ 250	\$ 0	\$ 250	Tink Fee	✕
Food & Beverages ▼	\$ 700	\$ 0	\$ 700	Mitchell's	✕
Advertising ▼	\$ 5	\$ 45	\$ 50	Posters	✕
Total	1255.00	45.00	\$1300		

+ Add item

Back
Finish

Completed Budget

After you finish both steps and click **Finish**, your budget request should like this:

<p>9497 Flagship Event</p> <p>Event - Social (Large - 100+)</p> <p>Priority - high</p> <p>Our flagship event is designed to help students de-stress during midterms. We do this by purchasing Mitchell's Ic...</p> <p> Brandon Dunbar</p> <p>Submitted on Jan 18, 2019 12:11 PM</p> <p>EVENT DETAILS</p> <p> Tinkham Veale University Center</p> <p> Mar 15, 2019 - Mar 15, 2019</p> <p> 300</p>	Name	Total Funds Needed (\$)	Requested (\$)
	Services/Contracts - Performances ⓘ	300	300
	Rental - Space ⓘ	250	250
	Food & Beverages ⓘ	700	700
	Advertising ⓘ	50	5
	Total	\$1300	\$1255

Things to Remember

Events/budget requests can be edited or deleted any time until the submission period closes.

Amount Requested refers to money being requested from your board.

Amount Financed by Group refers to money intended to be spent from Club Funds. If you request money only from the Amount Financed by Group category, it will not appear in your final submission because you are requesting no money from the board itself. If you wish to show the amount financed from the group's club funds, the allocated amount must be at least \$1. **NOTE: This field is not used when doing a budget request under the Group Funds Only Rolling Budget.**

Priority is for your group to let the allocating body know which budget requests are most important to your group. The allocating body may limit the number of high, medium or low priority events. Have a discussion within your executive board about what is the most important event. Make that high priority, then make all other events medium or low priority accordingly.

After Submission

Once your budget is submitted, the finance committee of your board will review all of the applications from all groups. After they have made their decisions, the status of your funding will change from the orange "submitted" color to one of the following three colors:

- Dark Green = Funding Provided
- Light Green = Funding Partially Provided
- Red = Funding Not Provided

If you are unable to differentiate the colors, hovering over one of the dots will show their explanation.

APPROVAL			
Requested	Approved	Notes	ⓘ
150.00	100.00 ✎		
250.00	250.00 ✎		
50.00	0.00 ✎		
75.00			

After Approval

After your budget has been approved, you will see it in your budget tab of your group page. This is where you can use the **Request Payment** button to request payment/reimbursement for expenses related to events. **You will need to submit a separate payment request for each line**, so make sure you note on your receipt which purchased items go with which budgeted line items.

#ID	REQUEST	BUDGET ITEMS			APPROVAL			PAYMENTS						
		Name	Total Funds Needed (\$)	Requested (\$)	Approved (\$)	Notes	ⓘ	Date	Total Payment Requested (\$)	From Approved (\$)	From Group Funds (\$)	Remaining Balance (\$)	ⓘ	🔗
9499	Automatic Allocation Sponsorship Priority - medium Brandon Dunbar Submitted on Jan 18, 2019 12:21 PM	Automatic Allocation	100	100										
		Total	\$100	\$100	\$0			Total	\$0	\$0	\$0	\$0		

The status of the reimbursement can be checked through the workflow review button (located in the farthest right column). This shows where in the process your reimbursement is and can allow you to reach out to the necessary people, if needed.

	Date	Total Payment Requested (\$)	From Approved (\$)	From Group Funds (\$)	Remaining Balance (\$)	ⓘ	🔗
☰▶	Jan 08, 2019	-100	-100	0	0	●	🔗