1 - Plan Your Budget

Create your group's budget plan for the upcoming semester or year dependent on your umbrella organization's funding processes. You will need to determine what you would like to do, how much it's going to cost and what your priorities are.

Once this information has been established, you will then want to decide how much you want to request from your umbrella organization as well as other sources of funding.

Tip: Plan backwards in this process, understand when deadlines are and establish your plan accordingly.

2 - Request Funds from Your Recognizing Organization

Your group will now submit your budget requests under the normal Mass Funding process for your Umbrella Organization.

Requests will then be reviewed and then approved by your umbrella organization to be allocated to your club.

These allocated funds, along with club funds (which is revenue that your club has accumulated) will make up your total available funds.

3 - Establish Your Club's Budget Plan in CampusGroups

Based on your total available funds, you then need to determine your final budget plan using all available funds (allocated, club, co-sponsorships, etc).

Additional Funding Options

If you did not receive the amount of money you would like for your club through mass funding, there are multiple ways that you could potentially obtain additional funding:

- You could apply for rolling funding from your umbrella organization
- You could apply for reserve funds from the Allocations Committee
- You could apply for a co-sponsorship from organizations such as USG, RHA, SEC and others.

- You could reallocate money from an one event to a different desired one per your umbrella organization's guidelines
- Lastly, you could obtain more money by raising revenue by selling tickets to a program or having a fundraiser.

Once you have a firm budgeting plan, you can record it in CampusGroups. By doing so, CampusGroups can offer a global view of your board's finances in real time. It also provides a place for submitting payment/deposit documentation for recordkeeping purposes.

Map out how you are going to record your budget into CampusGroups. Here are some different examples of what this can look like:

Example 1 - By Event

Here you can see that budget allocation is done by event and each portion is labeled to appropriately indicate which items are budgeted:

37165 — Co-Sponsorships — Sponsorship
Submitted By Jared Heller — Jan 29, 2021 7:38 PM

Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	ⓘ
Sponsorship Internal Co-Sponsorships	1,000.00	0.00	1,000.00		💬	🟠
Sponsorship External Co-Sponsorships	4,000.00	0.00	4,000.00		💬	🟠
Total	$5,000.00	$0.00	$5,000.00	0.00		

37164 — Retreats — Event - Retreat (internal only event)
Submitted By Jared Heller — Jan 29, 2021 7:36 PM

Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	ⓘ
Food & Beverages Food	1,400.00	0.00	1,400.00		💬	🟠
Services - Coach/Instructor/Presenter Bonding Activity	550.00	0.00	550.00		💬	🟠
Apparel Apparel	350.00	0.00	350.00		💬	🟠
Travel - Lodging Transportation	300.00	0.00	300.00		💬	🟠
Total	$2,600.00	$0.00	$2,600.00	0.00		

37163 — Conferences — Event - Conference/Tournament - Attending
Submitted By Jared Heller — Jan 29, 2021 7:35 PM

Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	ⓘ
Travel - Registration NCC Conference Budget	3,400.00	0.00	3,400.00		💬	🟠
Travel - Other NCC Conference Discretionary	150.00	0.00	150.00		💬	🟠
Total	$3,550.00	$0.00	$3,550.00	0.00		

Example 2 – By Officer

Here, you can see that the budget allocation is done by executive board officer and each entry is a portion of their individual budget:

37161 — Vice President of Residential Experience — Automatic Allocation

Submitted By
Jared Heller
Jan 29, 2021 7:33 PM

Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	ⓘ
Services/Contracts – Other Advocacy Efforts and Programs	400.00	0.00	400.00		💬	🟠
Automatic Allocation Discretionary	300.00	0.00	300.00		💬	🟠
Total	**$700.00**	**$0.00**	**$700.00**	0.00		

37160 — Vice President of Residential Services — Automatic Allocation

Submitted By
Jared Heller
Jan 29, 2021 7:31 PM

Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	ⓘ
Services – Facilities Custodial Appreciation	530.00	0.00	530.00		💬	🟠
Automatic Allocation Discretionary	200.00	0.00	200.00		💬	🟠
Total	**$730.00**	**$0.00**	**$730.00**	0.00		

37159 — Vice President of Marketing — Automatic Allocation

Submitted By
Jared Heller
Jan 29, 2021 7:29 PM

Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	ⓘ
Advertising Advertising	1,000.00	0.00	1,000.00		💬	🟠
Automatic Allocation Discretionary	250.00	0.00	250.00		💬	🟠
Food & Beverages Elections	500.00	0.00	500.00		💬	🟠
Supplies External Swag	6,000.00	0.00	6,000.00		💬	🟠
Total	**$7,750.00**	**$0.00**	**$7,750.00**	0.00		

37157 — Vice President of Programming — Automatic Allocation

Submitted By
Jared Heller
Jan 29, 2021 7:15 PM

Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	ⓘ
Rental – Equipment Casino Night	4,000.00	0.00	4,000.00		💬	🟠
Automatic Allocation Discretionary	250.00	0.00	250.00		💬	🟠

Try to label each budget entry with one of the categories listed that is the most applicable to what you'd want to say. You can then title the entry in the notes section as seen here.

If nothing seems applicable (such as discretionary), you can default to automatic allocation.

# 4 – Record Your Overall Budget in CampusGroups

Anything regarding money needs to have a budget attached to it, so that the money can be deducted/transferred/deposited when a payment request is initiated in CampusGroups.

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.**

Recording Your Budget

In order to document your entire budget, you will create budgets within the **Group Funds Usage ONLY Rolling Budget.**
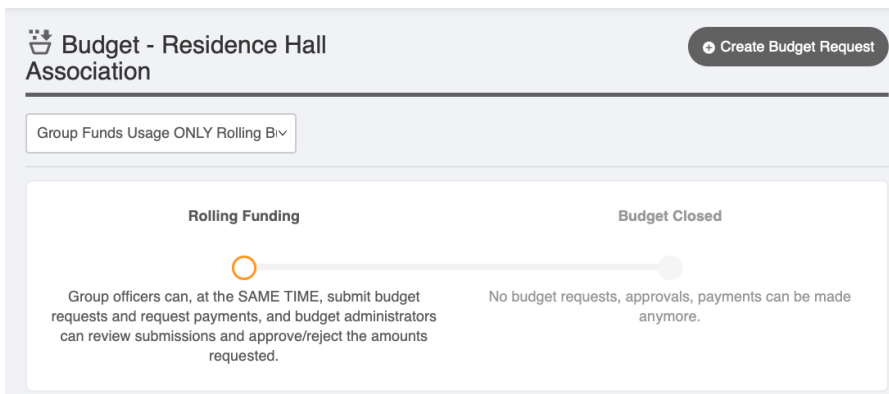
Creating Budget Requests

You should create budget requests in a systematic way such as by Club Officer or Event Type, as shown in the examples earlier in the document.

1. To begin a new budget request, click on **Create Budget Request** in the top right corner.
2. Next, you should fill in the applicable information for each officer or event.
   a. If sorting your budgets by officer, you can use Automatic Allocation as the budget request type.
   b. If sorting by event, choose the most applicable event type.
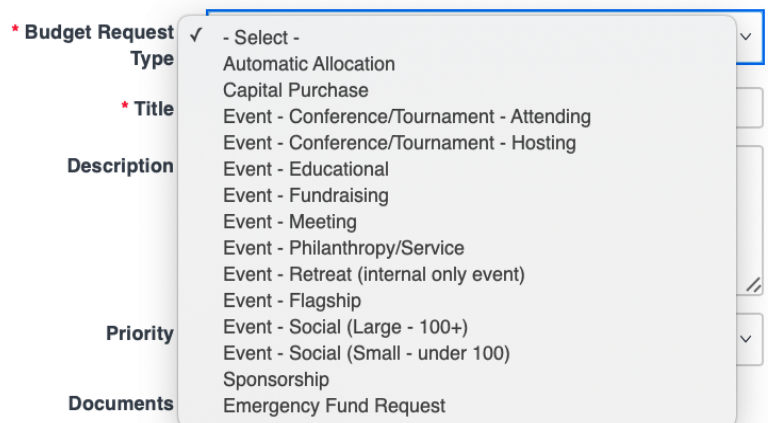
3. When you are finished with all of the information, click **Next** to proceed.
4. You will then be able to specify budget items that you will later apply payment requests against as expenses occur. Income should be recorded as an automotive allocation or revenue. Request the amount needed and place any additional notes in the notes section before hitting **Save**.

Recording Allocated Funds in Campus Groups

Your budget lines should be divided into categories (allocated vs club, etc). You should create a line for allocated funds from your umbrella group to note them. Payment requests for spending allocated funds are done under the allocated budget from which they came and not in the Group Funds only budget.

Example: If you have an event that you intend to be funded 50% through your allocated funds and 50% through club funds, put separate line(s) in as placeholders for these amounts so that group funds are reimbursed here while your allocated spending is done in the allocated budget so they can be tracked accurately.

Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	ⓘ
Advertising From Allocated Funds	200.00	0.00	200.00	100.00 ✏	💬	🟢
Prizes From Group Funds	750.00	0.00	750.00	700.00 ✏	💬	🟢
Food - Pizza/Snack Food From Group Funds	800.00	0.00	800.00	800.00 ✏	💬	🟢
Automatic Allocation From Allocated funds from USG support	200.00	0.00	200.00	🍺	💬	🟠
Total	**$1,950.00**	**$0.00**	**$1,950.00**	**1,600.00**		

41754 — Fall Fest — Event - Flagship — Priority - high — Submitted By Jared Heller Apr 9, 2021 1:03 AM

5 - Track Your Club Funds

Deposits and withdrawals from the club fund can be done through the Group Fund Usage ONLY Budget. All deposits and withdrawals require a budget so that the system can know where to put/take the money from when a payment request is entered.

Club funds not attached to any Mass/Rolling Funding request can be requested directly using the Group Fund Usage ONLY budget. A budget will need to be made by the group and the parent organization will approve or deny use of funds during the payment request process, similar to the process for mass/rolling funding.

There will be no budget approvals but payments are approved by your respective recognizing organization.