

**STUDENT ASSOCIATION, INCORPORATED**  
**DUE TO SAI BY FRIDAY, FEBRUARY 11<sup>TH</sup> 3:30PM**

ORGANIZATION \_\_\_\_\_ YEAR: 2011-2012

COST CENTER (3 digits) 03 – XXXXX – \_\_\_\_\_

(See pages 8 an 9 for instructions)

<b>Account Number</b>	<b>Expense Category</b>	<b>Amount</b>
65010	Transportation	\$
65210	Conferences & Travel	\$
65320	Meals & Refreshments	\$
67280	Miscellaneous	\$
67290	Fundraising	\$
67900	Program Expenses	\$
70060	Apparel/Costumes	\$
70290	Special Events	\$

TOTAL REQUEST ..... \$ \_\_\_\_\_  
*(Check your math!)*

	<b><u>Signature</u></b>	<b><u>Print Name</u></b>	<b><u>Campus Phone</u></b>
<b>President</b>			
<b>Treasurer/Secretary</b>			
<b>Advisor</b>			

*(EVERYTHING MUST BE WRITTEN IN PEN. NO PENCIL IS ACCEPTED)*

Date received by SAI \_\_\_\_\_

Signature of Authorized SAI Recipient \_\_\_\_\_

**BUDGET REQUEST PACKET 2011-2012**  
**ACTIVITY DETAIL**

Please provide detailed information for all funds being requested by expense category. See PAGE 4 for an example. You may substitute a computer generated form for this sheet only.

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## CHART OF ACCOUNTS FOR CLUBS AND ORGANIZATIONS

*(The 8 account numbers below are the only expense account numbers you are able to use.  
All budgeted items must be placed into one of these accounts.)*

Account Number	ACCOUNT NAME
<b>65010</b>	<b>Transportation</b> <i>Bus Rental</i> <i>Driver Checks</i> <i>Mileage</i> <i>Tolls</i>
<b>65210</b>	<b>Conferences and Travel</b> <i>(All costs associated with attending a Conference or Seminar)</i> <i>Airfare</i> <i>Conference/Seminar Fee</i> <i>Lodging</i> <i>Meals while traveling</i> <i>Vehicle Rental</i>
<b>65320</b>	<b>Meals and Refreshments</b>
<b>67280</b>	<b>Miscellaneous</b>
<b>67290</b>	<b>Fundraising</b>
<b>67900</b>	<b>Program Expenses</b> <i>Advertising, Publicity, Promotions</i> <i>Awards</i> <i>Bands/Concerts</i> <i>Consultants</i> <i>Dues and Subscriptions</i> <i>Equipment Repair</i> <i>Honoraries</i> <i>Insurance</i> <i>Materials and Supplies</i> <i>Memberships and Registrations</i> <i>Tournaments</i> <i>Office Expense</i> <i>Part-time Wages</i>
<b>70060</b>	<b>Apparel/Costumes</b>
<b>70290</b>	<b>Special Events</b> <i>Homecoming</i> <i>Family Day</i>

**BUDGET REQUEST PACKET 2011-2012**  
**SAMPLE ACTIVITY DETAIL**

**PROGRAM EXPENSES**

- Membership dues paid to National Organization
  1. 20 members at \$15 each member = \$300
- Signs for organization fair = \$20
- Supplies for organization fair = \$20
- Senior gifts
  1. Estimate 5 seniors at \$20 each = \$100

**Total Program Expenses = \$440**

**TRANSPORTATION**

- 3 in-state driver checks = 3 x \$15 = \$45
- Mileage
  1. 100 miles @ \$.55 = \$55

**Total Transportation Expenses = \$100**

**CONFERENCES AND TRAVEL**

12 members will be attending the annual conference in Baltimore, MD for 4 nights, 5 days

- Lodging = \$149 per night, 4 people per room, 3 rooms = \$149 x 4 nights x 3 rooms = \$1,788
- Conference Fee of \$69 per person = \$69 x 12 = \$828
- Meals- 50% of gsa.gov is \$35 per person per day = \$35 x 12 x 5 days = \$2,100
- Mileage-220 miles one way so round trip is 440 x \$.50 per mile = \$220

**Total Conferences and Travel Expenses = \$4,936**

**APPAREL**

T-shirts for all 20 members at \$10 each = \$200

**Total Apparel = \$200**

**FUNDRAISING**

- Plan on selling Sarris or Colebrook chocolate cover pretzels = \$500
- Raffle tickets for lottery = \$100

**Total Fundraising Expenses = \$600**

*Total expenses = \$6,276 (this should match the amount on the front page of your budget packet)*

# Campus Organization Information Form

Student Association, Inc.  
California University of Pennsylvania  
724-938-4303  
Campus Box # 85  
Effective Date \_\_\_\_\_

(PLEASE PRINT NEATLY AND SIGN WHERE INDICATED....NO PENCIL IS ACCEPTED)

Organization Name \_\_\_\_\_

Campus Box of Advisor \_\_\_\_\_

<i>Officers</i>	<i>Phone Number</i>	<i>E-mail Address</i>
_____ President	(____) _____ - _____	_____@calu.edu
	_____ Signature of President	
_____ Vice President	(____) _____ - _____	_____@ calu.edu
	_____ Signature of Vice President	
_____ Secretary	(____) _____ - _____	_____@ calu.edu
	_____ Signature of Secretary	
_____ Treasurer	(____) _____ - _____	_____@ calu.edu
	_____ Signature of treasurer	
_____ Advisor	(____) _____ - _____	_____@ calu.edu
	_____ Signature of Advisor	

(please add lines for other elected officers or co-advisors)

When does your organization meet? \_\_\_\_\_

Where does your organization meet? \_\_\_\_\_

**Please circle**

We hold elections in:    **Spring**        **Fall**        **Both**

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**SAI USE ONLY**

Received \_\_\_\_\_

Cost Center \_\_\_\_\_

# GROUP ROSTER

# ACTIVITIES TRANSCRIPT Be Recognized

Activities Transcript Office c/o Student Development & Services  
California University of Pennsylvania  
Natali Student Center, 250 University Avenue  
California, PA 15419

Phone: 724-938-4515 or 5973  
Fax: 724-938-5959  
Email: [activitiestranscript@calu.edu](mailto:activitiestranscript@calu.edu)  
Web: <http://sai.calu.edu/activitiestranscript>

Organization Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Advisor: \_\_\_\_\_ Advisor Email: \_\_\_\_\_  
 Title: \_\_\_\_\_ Advisor Signature: \_\_\_\_\_  
 Date: \_\_\_\_\_

	Student Name	Cal U Email ID (example: abc1234)	Fall	Spring	Enrollment Status (FR,SD,JR,SR,GRAD)	Current Position
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
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14						
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25						

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# COMMUNITY SERVICE HOURS

Organization Name: \_\_\_\_\_

President's Signature: \_\_\_\_\_

Advisor's Signature: \_\_\_\_\_

Date of Service	Location of Service	# of People Participating	# of Hours Worked	Type of Work Performed	Name of Event Supervisor

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## INSTRUCTIONS

There are 4 main parts to the Budget Process for fiscal year 2011-2012. They are:

1. Budget Request and Activity Detail Forms
2. Campus Organization Information Form
3. Group Roster
4. Community Service Form

### *Part 1 – Budget Request and Activity Detail Forms*

#### **STEP ONE – Discuss the 2011-2012 activities with the entire club.**

The first step in preparing your budget request for next year is to think about what your club's activities will be for the next academic year. Will you basically do the same things you did this year or is there something new that you would like to try? Everything should be discussed at a meeting prior to working on the budget so that your entire club has a say in the budget request.

#### **STEP TWO – Plan the activities and estimate the cost of each activity.**

There is a sample Activity Detail Form on page 4 of this packet. You will want to be as specific as possible when completing the form on page 2 because this is the page that shows your Cabinet Representative why you are asking for the dollar amount in your budget request. Remember that your Cabinet Representative is your voice at the allocation meeting and that person needs to have as much information as possible regarding your budget request so that he or she may defend that request when questions are asked.

Basically you will need to provide back up for whatever dollar amount you are requesting in each expense category. If you are planning on going to an annual conference that your club always attends but are unsure of the costs, simply use the amount from last year that your club spent and increase it by 10%. Just remember to document that on your Activity Detail Form so it is easy to see where the number you estimated came from.

#### **STEP THREE – Complete page 1, the Budget Request Form**

Now that you have planned out all of your activities and have the back-up for all expenses listed on the Activity Detail Form, page 2, you can transfer the total amounts to the Budget Request Form on page 1. The total request on page 1 should equal the amount you have on your detail form on page 2.

#### **STEP FOUR – Have the appropriate people sign the Budget Request Form**

The President, Treasurer/Secretary, and Advisor all must sign the Budget Request Form. All signatures must be in pen.

### Part 2 – Campus Organization Form

The Campus Organization Form is a document that must always be kept current at SAI because that tells the Business Office staff who is authorized to spend money from your account and receive your account information. Anytime you have a change in officer or advisor, a new Campus Organization Form needs to be submitted immediately to protect your account. Even if you do not hold elections until after the Budget Request is submitted, you must still complete and turn this form in with your Budget Request in order for your request to be accepted. Just remember that once elections are held, a new form should be submitted.

### Part 3 – Member Roster

The Group Roster is part of the CUE Transcript program. Please list all members of your club for the Fall 2010 and Spring of 2011 semesters. Make copies of this form if additional space is needed and remember to print in ink. If you have this electronically, you may print out your roster and attach it to this sheet but it must contain the same information.

The most important thing to remember is that the Group Roster **requires an advisor's signature to be valid**. The advisor signature serves to verify participation of each member in your club and authorizes the club participation be placed on each members CUE Transcript.

### Part 4 – Community Service Form

The Community Service Form is reviewed by Student Cabinet during the allocation process and can be looked upon by Cabinet members as a good reason to increase a club allocation. Please complete this form for any Community Service your club has done during the Fall 2010 semester and also include any planned activities for the Spring 2011 semester.

### **Submitting your Budget Request Packet for 2011-2012**

You must submit ONE original copy of your budget request packet that includes all 4 parts described above along with any supporting materials to the SAI Business Office, Third Floor of the Natali Student Center, **before 3:30 p.m. on Friday, February 11, 2011**. You will be given a signed receipt as proof of submission. Free photocopying for this purpose only is available in the SAI Business Office. Packets received after the deadline are subject to a penalty of 5% of the requested amount per day. **Packets received after Friday, February 25, 2011 will NOT be considered for allocation in the academic year 2011-2012.**

You are highly encouraged to complete your budget request and turn it in as soon as possible. The quicker we receive your request, the quicker your Cabinet Representative will get it for review and be able to schedule a time to meet with you and your club to discuss the request.