

# Student Activities Council

U N I V E R S I T Y   o f   P E N N S Y L V A N I A

---

---

## **Budgeting and Allocations instructions**

**Memo from the SAC Chairman  
January 30, 2003**

**Attention:** All Treasurers / Financial Managers\* of SAC recognized groups

\* If you are not the designated treasurer to your group, please ensure that he/she receives this memo, since it contains important information pertaining to the annual budgeting and allocations process for next year. By attending this meeting, you are agreeing that the applicable person is/will be duly informed.

---

Dear SAC Representative(s):

It's once again that time of year when we need to begin thinking about the annual SAC budgeting and allocations process. To many of you this may be a first, to others a routine procedure. The information contained within this document is designed to assist you in preparing your budget, regardless of your proficiency in this regard.

Please adhere closely to the deadlines and guidelines contained herein to ensure that the process is an efficient, constructive one.

To this end, Exec recently established a budgeting "think-tank" which has re-evaluated our funding standards, policies and priorities. The review led to a consolidation of documents and outlines clearly our standards and funding priorities for the upcoming academic year. Over time, this has become increasingly necessary due to increases in the number of SAC recognized groups, rising costs, overlaps in group activities and above all, a desire to be as fair and equitable as possible. Please familiarize yourself with these standards prior to preparing your budget.

We encourage you to give us feedback on this process at your budget interview or by contacting your SAC Exec Liaison. If you have any questions or problems, please do not hesitate to contact your liaison for advice or assistance. The SAC liaison list is attached.

- **FRIDAY, JANUARY 31** will be the official launch date for SAC's Sept 2003-May 2004 annual allocation process.

Using Microsoft Excel, groups will be able to enter details of their events and operations into a easy to understand system that automatically formats the request to meet SAC's specifications. If you would like to request a copy of your group's budget submission for the 2002-2003 academic year, please contact Michelle Nettleton at [mvn@pobox](mailto:mvn@pobox) in the Office of Student Life.

We hope that this tool will remove some of the ambiguity and confusion from the process. The tool, called the SAC Budget Maker, is available on SAC's website at <http://dolphin.upenn.edu/~sac>. Click on the "**Budget 2003-2004 link**" on the homepage. Here you will find the following:

- 1- **Budgeting and Allocations Instructions**
- 2- **Budgeting and Allocations Step-by-Step tips**
- 3- **SAC's "Funding Guidelines/Standards and Priorities" document**
- 4- **SAC's "Funding Policies" document**
- 5- **SAC Budget-maker file: Excel file**

All budgets must be created using this file. Other submissions will not be accepted or considered without specific approval from the Executive Committee. Again, if you have any problems downloading or understanding the operations of the file, please contact your SAC Exec Liaison.

All of the instructions and details are contained within the file itself, but here is some highlighted information:

- **BUDGET CREATION INFORMATION:** Available January 31, 8AM on SAC's website.
- **BUDGET SUBMISSION DEADLINE:** February 21, 5PM in the Office of Student Life.

200 Houston Hall (second floor). This deadline is very firm. Submissions after this deadline will not be considered during the annual allocations process. **Your group must submit 11 hard copies of the budget.**

- **BUDGET INTERVIEWS WITH SAC EXEC:** February 27 - March 02

Sign-ups will be available in the Office of Student Life when you submit your budget. Sign-ups are on a first-come first-serve basis. All groups must meet with SAC-Exec, failing which your budget will not be considered during the allocation process. There will be bins set-up for groups to place their budgets in. Budgets must be **placed in numerical order** (by the printed number that will appear in the upper left hand of your budget's first page). Interviews will not be rescheduled. All interviews will be held in Houston Hall. **Groups that miss their interview will not receive a Sept 2003-May 2004 budget allocation.**

- **BUDGET RECOMMENDATIONS RELEASED: April 1, 8AM** on SAC online

Budget briefs are released via your group's SAC online account. If you do not already have a password for your account, your treasurer can pick it up from Michelle Nettleton in the Office of Student Life. To login, visit the SAC website.

- **BUDGET APPEALS DEADLINE: April 7, 5PM** in the Office of Student Life.

If your group is not satisfied with their allocation, they can appeal the decision. All appeals must be submitted by this deadline to be considered.

- **APPEAL DECISIONS ANNOUNCED: April 18, 5PM** on SAC online

SAC-Exec will release its opinions on all of the appeals to the appealing groups at this stage.

- **SAC ANNUAL ALLOCATIONS MEETING: April 23, 5:30PM**

This is the General Body meeting where SAC-Exec recommended budget allocations will be approved by the body. **Attendance for the entirety of this meeting is MANDATORY.** Groups not in attendance will not have their budget voted on and will have their accounts frozen until they meet with SAC Exec in the Fall of 2003.

---

Exec realizes that this process can be intimidating, but done properly, the entire process will go a greater deal smoother for all involved. Due to the number of groups involved, and the need to interview each one, we really do ask that you thoughtfully plan your events for next year and that over the next few weeks you prepare your budget request accordingly. As with any budget preparation one does, a solid, well constructed document is undoubtedly viewed upon more favorably than those that aren't. In this regard I've attached a few tips for successful budgeting, which I hope will be of use.

Please remember, your group has a SAC Exec liaison who can answer questions and assist your group. If you have any questions or concerns feel free to e-mail your liaison.

Thank you and good luck!

Yours sincerely,



**SIMON E. BLAND**