



**ASSOCIATED
STUDENTS INC.**

C H A N N E L
I S L A N D S

Associated Students Inc. Budget Request Process

A guide to requesting a budget for fiscal year 2017-2018

Associated Students Incorporated (ASI)

- Associated Students Incorporated is a non-profit auxiliary which exists to support the educational mission of CSU Channel Islands.
- ASI facilitates learning and development through integrative and co-curricular approaches
- Identifies and responds to major student issues and initiatives
- Implements sound business practices which uphold the fiduciary responsibility associated with the management of student fees
- Funds the operation and facility of the CI Student Union

ASI Board of Directors

- The Board of Directors is comprised of nine students, three University Administrators, one University Faculty member, and one community member.
- The ASI Board is responsible for the oversight and management of ASI, which includes the allocation of ASI funds.

BASC

Budget Allocation and Spending Committee (BASC)

- ◊ The BASC was created as a committee of the ASI Board of Directors tasked to oversee the process of ASI budget requests.
- ◊ The BASC is comprised of six ASI Board Members—four students and two non-students.
- ◊ The BASC presents all budgets to the ASI Board who can either approve, amend, or deny the budget requests.

Spring 2017 Budget Request Timeline

January 5th: ASI office sends budget request packets to student organization president, vice president, treasurer, and advisor.

January 30th – February 8th: Treasurer is required to attend one mandatory budget workshop. We recommend presidents and vice presidents attend a workshop with the treasurer.

February 10th: Requestors must email Jennifer Shoemaker (jennifer.shoemaker@csuci.edu) completed budget packet no later than 5 p.m. Completed budget packet includes:

- Budget Request Excel
- Budget Request Power Point
- Signed BASC procedures (submitted on CI Sync) <https://orgsync.com/52346/forms/235703>

IMPORTANT: Budget packets turned in after the deadline of February 10th by 5 p.m. will **not be accepted.**

February 13th – 19th: Budget requestors must sign up for a budget presentation time. Jennifer Shoemaker will email a sign up link to each requestor. Sign-ups are on a first-come, first-served basis. Organizations that fail to sign up by February 19th will not be eligible for funding.

February 20th – March 17th: Present budget PowerPoint presentation to the BASC during your assigned budget presentation time.

April 27th: BASC presents to ASI Board

Step 1: Determine if your organization is eligible for funding?

- **Student Organizations:** All student organizations seeking funding must be registered with the University by the SEAL Center. Student organizations seeking funding must be open to membership to all CI students, regardless of race, color, religion, nationality, gender, national origin, age, disability, sexual orientation, economic status, marital status, veteran status, GPA or parenthood.
- **Political Organizations:** Organizations will not be considered for funding to advance any candidate or ballot issue in an off-campus election, or to finance off-campus lobbying or political activities of non-students.
- **Athletic Organizations:** The BASC shall ***not*** fund any sports club, as they are eligible to receive funding from the recreation and athletic fee.

Step 1: continued...

- o The ASI Board of Directors oversees financial management of the Student Body Association Fee. **Any campus recognized organization may request funding through ASI.** ASI is committed to providing funding on a fair, equitable, and transparent basis. Funding is limited; therefore, allocations are made based on the following criteria:
 - o Enhances the ASI Statement of Purpose.
 - o Accessible to the entire student body and reaches as many students as possible.
 - o Enhances significant out-of-classroom cultural, social, educational, or recreational opportunities.
 - o Improves student life at CI.
 - o ASI funding for student organizations is insufficient to meet 100% of the needs and requests for all CI student organizations. Budget requests should reflect effort to obtain funding through other means such as fundraising, participation fees, or donations. Efforts made to secure other funds will be considered in the allocation process
 - o ASI funds cannot be used for events/requests connected to academic course requirements.

Step 2: Complete Budget Packet

It is in your favor to complete the packet in the following order.

- A. **BASC Procedures:** Open in CI Sync, read, fill out bottom, and submit. Once you submit, your advisor will receive an email, which they have to approve. Once the form is approved by your advisor this step is complete.
- B. **ASI Budget Request PowerPoint:** Complete the PowerPoint before completing the excel document. The PowerPoint will help you organize the events and the expenses involved with those events. Do not type in the yellow cells.
- C. **ASI Budget Request Excel:** Make sure the totals you insert in the excel document match the totals in the PowerPoint document.

All forms can be found at:
<http://asi.csuci.edu/documents.htm>

A. Budget Allocation and Spending Procedures

- o *Prior to building your budget*, read the Budget Allocation and Spending Procedure, which can be found at:
<http://asi.csuci.edu/documents.htm>
- o Please **read, fill out, and submit** the Budget Allocation and Spending Procedure on CI Sync before completing the PowerPoint and Excel. The next two slides will guide you in completing this document.
- o Please note, by signing the BASC procedures you are agreeing you understand and will abide by them.

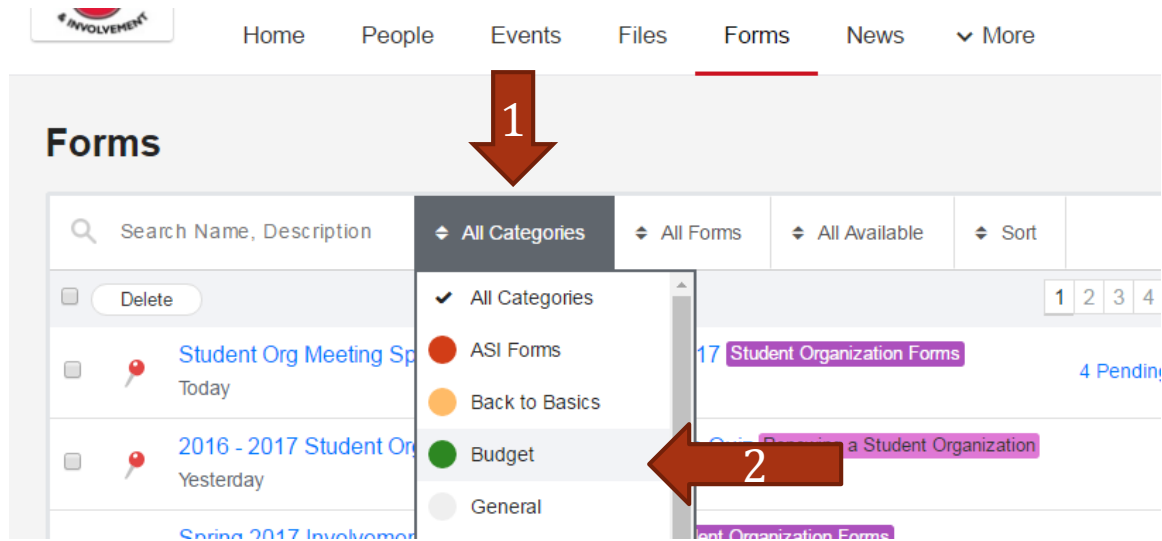
A. Budget Allocation and Spending Procedures

- Login to CI Sync
- Click on “My Memberships”
- Select the organization you are requesting funds for.
- Once you are on the organizations home page. Click the “Forms” tab.

The screenshot displays the Islands University CI Sync web application. At the top, a dark navigation bar includes the university logo, a search bar, and user options for Admin, My Memberships, and a profile for Jennifer (430). Below this is a large banner with text about CI leaders and student organizations. A secondary navigation bar contains links for Home, People, Events, Files, Forms, News, and More. A dropdown menu is open under 'My Memberships', listing various organizations like Student Organizations and Involvement, Bicycle Kitchen, ASI Administration, and Breaking Pointe Dance Club, with an 'All Memberships' link at the bottom. Three red arrows with numbers indicate the procedure: Arrow 1 points to the 'My Memberships' link in the top bar; Arrow 2 points to the 'Student Organizations and Involvement' option in the dropdown menu; Arrow 3 points to the 'Forms' link in the secondary navigation bar.

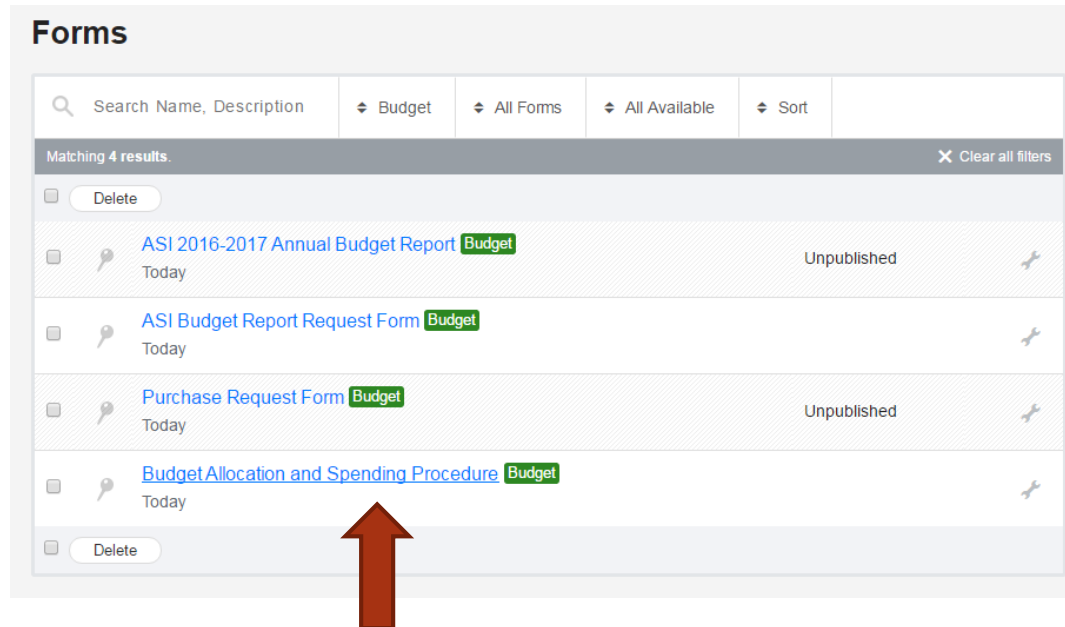
A. Budget Allocation and Spending Procedures

- Click the “All Categories” drop down.
- Select “Budget”



A. Budget Allocation and Spending Procedures

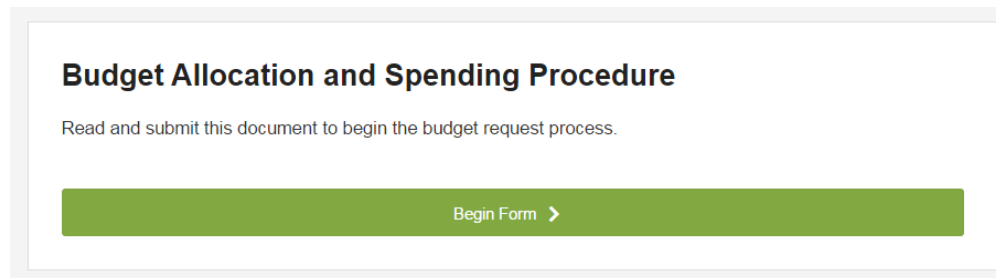
- Click on “Budget Allocation and Spending Procedure”



The screenshot shows a web interface titled "Forms". It includes a search bar and several filter buttons: "Budget", "All Forms", "All Available", and "Sort". Below the filters, it states "Matching 4 results." and provides a "Clear all filters" link. The results are listed in a table-like format with columns for document name, date, status, and actions. A red arrow points to the link "Budget Allocation and Spending Procedure" in the list.

Document Name	Date	Status	Actions
Delete			
ASI 2016-2017 Annual Budget Report Budget	Today	Unpublished	
ASI Budget Report Request Form Budget	Today		
Purchase Request Form Budget	Today	Unpublished	
Budget Allocation and Spending Procedure Budget	Today		
Delete			

- This should bring you to the page below, where you can click begin and start reading the document. Then filling in the information at the bottom and submit.



The screenshot shows a document titled "Budget Allocation and Spending Procedure". Below the title, it says "Read and submit this document to begin the budget request process." At the bottom, there is a green button labeled "Begin Form >".

B. PowerPoint: Come up with a plan


- Create a plan for the event or expenses you are requesting funds for. If you are planning for events, think of all the expenses involved with the event you want to host.

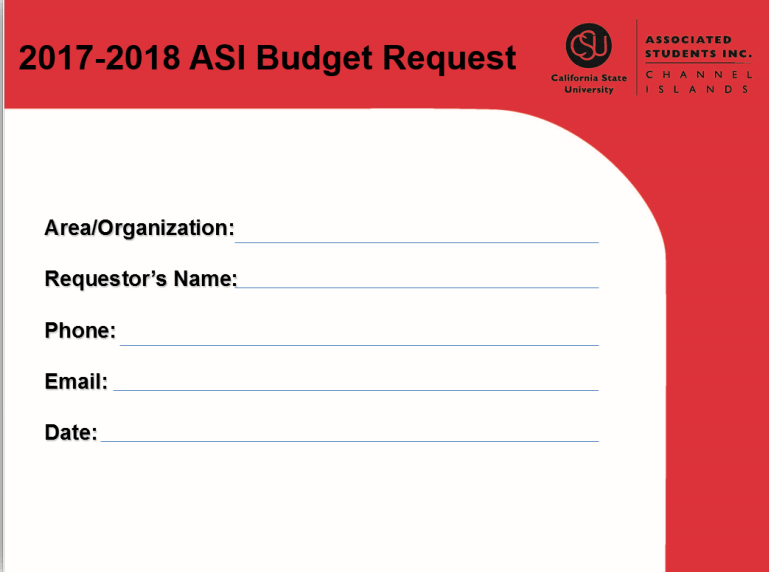


- Use this plan to fill out the budget form in the PowerPoint presentation

Account	Program / Initiative Name - Description	Amount
660002_Printing		\$150.00
660003_Supplies and Services - Other		\$200.00
613001_Contractual Services		\$500.00
613801_Professional Services		\$500.00
613802_Honorarium Fees		\$300.00
660816_Membership Dues & Fees		\$450.00
660833_Promotional Items		\$250.00
660834_Awards & Gifts		\$100.00
660820_Business Meals_Hospitality		\$500.00
TOTAL		\$2,950.00

B. ASI Budget Request PowerPoint

- Download document from <http://asi.csuci.edu/documents.htm>
- The first page looks like this 
- Fill out slides 1, 2, 4 & 5
- Use slide 6 as an example on how to fill out the form in slide 7
- To enter your expenses into the grid, **double click** the grid to pull up the linked Excel sheet. Enter your expenses (they will total automatically).



The form is titled "2017-2018 ASI Budget Request" and features the logos for California State University and Associated Students Inc. Channel Islands. It contains several input fields for personal and organizational information.

2017-2018 ASI Budget Request

California State University

ASSOCIATED STUDENTS INC. CHANNEL ISLANDS

Area/Organization: _____

Requestor's Name: _____

Phone: _____

Email: _____

Date: _____

Account	Program / Initiative Name - Description	Amount
660002_Printing		\$150.00
660003_Supplies and Services - Other		\$200.00
613001_Contractual Services		\$500.00
613801_Professional Services		\$500.00
613802_Honorarium Fees		\$300.00
660816_Membership Dues & Fees		\$450.00
660833_Promotional Items		\$250.00
660834_Awards & Gifts		\$100.00
660820_Business Meals_Hospitality		\$500.00
TOTAL		\$2,950.00

Double Click

B. ASI Budget Request PowerPoint Cont....

- Complete one “Initiative, Program or Event” slide for every individual initiative, program, or event in your budget request.
- Expenses not related to any event, e.g. office supplies, promotional, etc., should be listed on a separate “initiative” slide per each expense item.

Initiative, Program or Event

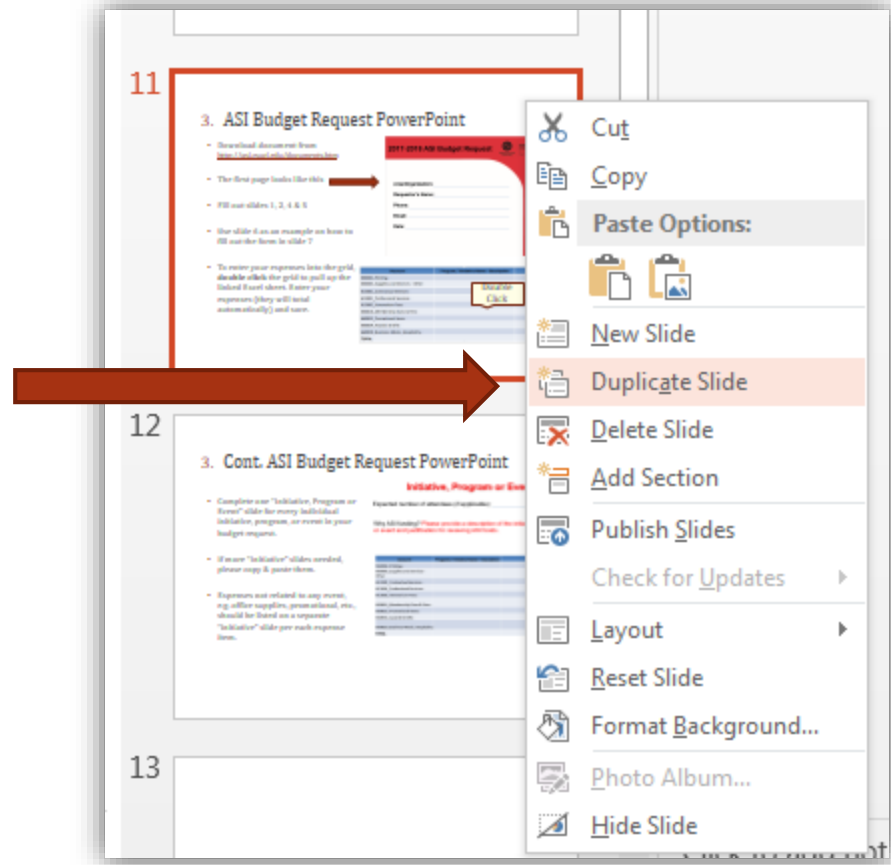
Expected number of attendees (if applicable): _____

Why ASI funding? **Please provide a description of the initiative, program or event and justification for receiving ASI funds.**

Account	Program / Initiative Name - Description	Amount
660002_Printing		
660003_Supplies and Services - Other		
613001_Contractual Services		
613801_Professional Services		
613802_Honorarium Fees		
660816_Membership Dues & Fees		
660833_Promotional Items		
660834_Awards & Gifts		
660820_Business Meals_Hospitality		
TOTAL		\$

B. ASI Budget Request PowerPoint Cont....


- If more “Initiative or Event” slides are needed, duplicate the last slide by following these steps:
 - Select the slide you would like to be duplicated (it will be outlined in red).
 - Right click the slide and these options will pop up.
 - Click on “Duplicate Slide.” Then make necessary adjustments.
- Once the PowerPoint is complete to your satisfaction save and send **after** you complete the Budget Request Excel (next step).



C. ASI Budget Request Excel:


(please see the example below)

- Download document from <http://asi.csuci.edu/documents.htm>
- As you complete the excel, do NOT type in the yellow section. This section is connected to a formula and will populate automatically.

ASSOCIATED STUDENTS INC. CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS 2017 - 2018 BUDGET REQUEST SUMMARY		
STUDENT ORGANIZATION: 		
DO NOT TYPE IN YELLOW CELLS		
	2017-2018	
Account	Proposed Budget	
660002_Printing	\$	-
660003_Supplies and Services	\$	-
613801_Professional Services	\$	-
613802_Honorarium Fees	\$	-
660833_Promotional Items	\$	-
660834_Awards & Gifts	\$	-
660820_Business Meals_Hospitality	\$	-
Total Request	\$	-
* Do not request more than \$3,000		
Please refer to BASC procedures for more information.		
Summary	Example	660002_Printing
		660003_Supplies and Services

C. ASI Budget Request Excel Cont. :

(please see the example below)

- The second tab is an example and looks like this: 
- Before filling out the budget request excel, decide what events and expenses your organization would like to request and complete the PowerPoint (Slide 12).
- Then decide what months your organization will need those expenses.
- Separate the expenses and put them on the correlating tab in the Excel.
- Save and send to Jennifer.shoemaker@csuci.edu with the correlating PowerPoint by 5 p.m. February 10th.

ASSOCIATED STUDENTS INC. CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS			
2017 - 2018 BUDGET REQUEST EXAMPLE			
STUDENT ORGANIZATION:		<u>Silly Peeps</u>	
ACCOUNT:		<u>660002 - Printing</u>	
AMOUNT REQUESTED:		<u>\$ 30</u>	
Program / Initiative Name - Description		Month	Amount
Event 1 - 5 Large posters		April	\$ 20
Event 2 - small fliers to hand out.		February	\$ 10
Total			\$ 30
NOTES:			

Summary	Example	660002_Printing	660003_Supplies and Services
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Step 3: Submit Budget Request Packet

- Read, fill out, and submit Budget Allocation and Spending Procedures on CI Sync.
- Email budget request PowerPoint and Excel.
 - Type the following in the subject line: “Budget Request – (student organization name)”
 - Send to Jennifer.shoemaker@csuci.edu by **5:00 p.m. on February 10th**

*Late budget request packets will **NOT** be accepted

Step 4: Sign up for Budget Presentation

- On February 13th, Jennifer Shoemaker (ASI Budget Assistant) will send all budget requestors a link to CI Sync, where you can sign up for a time slot to present to the Budget Allocation and Spending Committee (BASC).
- The form you will fill out in CI Sync is called “Budget Workshop Registration.”
- Deadline to sign up for a presentation time is **February 17th**. Please note presentation sign ups are on a first-come, first-served basis. Late sign ups will **NOT** be accepted.

Step 5: Present your Budget Request

- Your Budget Request PowerPoint will be used to present your budget request to the BASC during your assigned presentation time.
- The ASI staff will have your Power Point ready and displayed on the screen during your assigned presentation time, so you do not need to bring a copy.
- Each presenter will have 10 minutes to present their requested budget and 5 minutes for questions and answers with the BASC.
- Please be on time and prepared to present your request.
- **Consequences regarding presentation attendance:**
 - Late: Each presenter has 10 minutes to present. For every minute the presenter is late will deduct from their presentation time.

Ex. If presenter shows up 5 minutes late the presenter will only have 5 minutes to present.
 - No show: If presenter does not show up for the presentation they signed up for this will forfeit their opportunity to request funding.

Budget Request Check List

- ☐ Submit ASI Budget Allocation and Spending Procedure on CI Sync
- ☐ Complete ASI Budget Request PowerPoint
- ☐ Complete ASI Budget Request Excel
- ☐ Send ASI Budget Request PowerPoint and Excel to ASI Budget Assistant at Jennifer.Shoemaker@csuci.edu by **February 10th at 5:00 p.m.**
- ☐ Sign up for a budget request presentation time through the CI Sync link Jennifer Shoemaker emailed. Email her if you don't have the link. Deadline **February 17th.**
- ☐ Present to the BASC during your assigned date/time.

If you would like a copy of your 2016-2017 request or current budget report please email Jennifer.shoemaker@csuci.edu or 805-437-3929

After Your Presentation

- After hearing all budget presentations, the BASC will determine an allocation amount to recommend to the ASI Board. *Please note that funds are not guaranteed.*
- In April 2017, the ASI Board will review the BASC's recommended budget allocation and provide a final budget recommendation to the University President for approval.
- The University President usually approves the budget in June.
- ASI will provide student organizations with a completed budget Excel containing approved allocated funds after they have completed their registration with Student Organizations & Involvement.
- Approved allocated funds will be available July 1, 2017. Funds cannot be spent until a student organization has completed the registration or renewal process through the Student Organizations & Involvement department on campus.

Questions?

Please contact

Jennifer Shoemaker
ASI Budget Assistant
at Jennifer.shoemaker@csuci.edu
or 805-437-3929.

Office Hours:

Monday - Friday

7 a.m.- 4 p.m.

Thank you!