

Organization Budget Allocation Request Pre-Planning Guide

This resource is designed to help organizations do some pre-planning work in order to more efficiently and effectively develop their Organization Budget Allocation Request. Before you begin, review the Organization Budget Allocation Process guidelines and expectations (they can be found on the Student Leadership Development website); keep the guidelines in mind as you work through this pre-planning guide.

Recommendations:

- Don't wait until the last minute to start working on your budget request.
- Use this guide to help you gather information in advance and make filling out the online submission more efficient.
- If you need to take a break or can't finish the submission in one sitting, you can "finish later" and come back to it when you have more time; the same person needs to log in to pick-up where you left off.
- Read the instructions throughout the online budget request; these are helpful hints in filling out your request

There are three sections to the Organization Budget Allocation Request that your organization will fill out in TribeLink.

1. General information about the submitter and the organization
 - a. You will also name the budget request. Make sure you name the budget request in the following format: "specific quarter, name of organization" i.e. "Q1 Student Assembly Budget"
2. Event/Activity Forms - this is for you to provide information about specific events/activities for which you are requesting funding. You can fill out up to 5 forms within the budget request; if you need more, contact safinance@wm.edu.
 - a. Fill one form out for each individual/unique event/activity (this includes fundraisers) or conference/competition
 - b. Information requested will include:
 - i. Name/date of the event/activity or conference/competition
 - ii. Anticipated attendance and intended audience
 - iii. Co-sponsorship information
 - iv. Expected revenue/income and additional financial support/contributions
 - v. Past event information
 - c. For each event/activity or competition/conference please explain WHAT you are doing
3. Budget Template - this is where you explain the specific expenses associated with your operations, events/activities, or competitions/conferences.
 - a. What are the sections?
 - i. Operational Expenses - this section should be used for any general operating supplies or equipment the organization needs for standard operations
 - ii. Events/Activities – this section should be used for any events/activities the organization is hosting, including fundraisers
 - iii. Organization Travel Expenses – this section should be used for competitions/conferences/general organization travel (like field trips)
 - b. You should edit the name of the sections of the template, if applicable. For specific events/activities or competitions/conferences, please rename the sections to align with the Event/Activity forms
 - i. If you have multiple events/activities or competitions/conferences, you must "Add Another Section" for each Event/Activity form ***There should be a named section corresponding to each Event/Activity form***
 - c. For each line-item expense, you will add and rename each specific line-item expense, then provide a description (WHAT is it that you want to purchase/pay for and WHY do you need it)

- i. Select the appropriate category from the drop-down menu
- ii. Name the expense
- iii. Describe the expense
- iv. Identify the cost (quantity/amount)
- v. Upload supporting documentation (if applicable)

Make sure you review the request and then click submit and it will be reviewed by the Organization Budget Allocation Committee.

REQUEST

ADDITIONAL INFORMATION

BUDGET

Q1 Test Org

Requested Total	\$0.00
Reviewer Adjusted Total	\$0.00

Sections (3)	# of Line Items (0)	Amount
Operational Expenses	0	\$0.00
Events/Activities	0	\$0.00
Organization Travel Expenses	0	\$0.00

Budget Section:

Operational Expenses ☒

+ ADD ITEM

+ ANOTHER "OPERATIONAL EXPENSES" SECTION

Budget Section:

Events/Activities ☒

+ ADD ITEM

+ ANOTHER "EVENTS/ACTIVITIES" SECTION

Budget Section:

Organization Travel Expenses ☒

+ ADD ITEM

+ ANOTHER "ORGANIZATION TRAVEL EXPENSES" SECTION

FINISH LATER

PREVIOUS

SUBMIT