ASI Budget Process Orientation

Gary Au
Vice President of Finance
The Budget Process

- Begins in October
- Ends in May
- Allocates student fees to councils, departments, and programs
In Your Budget Orientation Information Packet

- ASI Mission Statement
- Budget Development Timeline
- Budget Preparation Instructions
- Line-Item Definitions
- Budget Policies
- Budget Guidelines
- Budget Request Format
The Associated Students, California State University, Fullerton, Incorporated (ASI) is the recognized student government at California State University, Fullerton, advocating student interests on-campus and in local, state, and national forums. The ASI strives to develop relevant and quality-minded services, facilities, and experiences, which are responsive to members of the campus and surrounding communities.
Mission Statement

The ASI fosters meaningful student development opportunities through leadership, volunteer, and employment experiences. In addition to out-of-classroom learning opportunities, the ASI provides campus community members with important social, cultural, and recreational opportunities as well as a wide range of programs and services.
In recognition of its responsibility to enhance student life, the ASI encourages and supports the activities of all California State University, Fullerton recognized student organizations whose activities stimulate individual and group participation within the university community.
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Budget Development Timeline

- Budget Orientations
  - October 13th, 16th, & 17th

- Part 1: General Information Due
  - November 7 at 5:00 PM

- Part 2: Proposals Due
  - January 9th at 5:00 PM

- Budget Hearings
  - Late January to Mid-February

- Finance Committee Deliberations
  - Mid-February to Late February
Budget Development Timeline

- ASI President’s Budget Proposal Released
  - March 9th

- Finance Committee Consideration
  - Early March to Mid-March

- Board of Directors Consideration
  - Mid/Late-March to Mid/Late-April

- University President Request for Approval
  - May

- Budget Implemented
  - July 1, 2015!!!
Preparation Instructions

- A formatted Excel workbook along with the PDF version of the 2014–2015 Fiscal Year budget will be provided to each program’s representative

- Input items and/or update requested amounts in new workbook
  - Use line-item definitions as a guide
  - Use wage summary form to calculate wages and benefits for personnel
Preparation Instructions

- Verify that all sums are correct on both the expense detail and the summary page
- Do not change formatting
- If you need any help at any time, contact the Vice President of Finance
Line-Item Definitions

- Line-items are used as a way to group similar expenses within a budget

- Input all expenses under the appropriate line-item

- Keep expenses consistent with Budget Policy
Familiarize yourself with ASI Budget Policy to create a strong request proposal

All budget requests must be consistent with policy
- Banquets
- Copies
- T-Shirts
- Awards
Budget Guidelines

- Remain committed to the ASI Mission Statement
- Be conservative and fiscally responsible, but also be creative and ambitious
- Provide clear, concise justification for your funding request
- Include both quantitative information as well as descriptions about the program’s activities and services
Budget Guidelines

- Present a reasonable case for representing CSUF student interests and concerns
- Must be compatible with the objectives of the program
- Must be consistent with the legal and fiscal obligations of the ASI
- Must be consistent with policies established by CSUF
Budget Request Format

- Part 1: General Information (Due Nov. 7 @5PM)
  - General Information
  - Organizational Structure
  - Activities

- Part 2: Proposals (Due Jan. 9 @5PM)
  - Funding Alternatives
  - Funds Requested
  - Additional Information
Submitting Budget Proposal

- **Deadline:** Friday, Nov. 7 & Jan. 9 at 5:00 PM

- Email an electronic copy to: asivpfinance@fullerton.edu & asclerical@fullerton.edu

- **This year:** Only electronic submissions
- No need to turn in 15 double-sided, hole-punched, and paper-clipped copies

- No late proposals will be accepted, and absolutely no exceptions will be made

- Budget hearing schedule will be posted on January 12
  - Email notification will be sent
After Today

- Begin putting together your budget proposal
- Schedule appointment with Vice President of Finance to discuss your budget proposal
- Submit proposal by Nov. 7 and Jan. 9 at 5PM
  - Email
  - No late proposals will be accepted
- Prepare for Budget Hearings
  - Review your request
Things to Remember

- Be responsible, creative, and ambitious
- Always refer to policy
- Submit budget request by Nov. 7 and Jan. 9 at 5 PM
  - Email: asivpfinance@fullerton.edu & asclerical@fullerton.edu
- Ask for assistance if you need it!
  - Draft Reviews
    - Batch 1: Dec 1
    - Batch 2: Dec 22
Online Support Information

- All materials in your packet available online, at:
  
  http://asi.fullerton.edu/government/budgetAndFinancialStatements.asp

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  - Office Line: (657) 278-3295
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    - Texting – Introduce yourself
Thanks for coming, everyone 😊