

FUNDING COMMITTEE MEETINGS

A worked packet and realistic hearing rehearsal

Your packet should let someone who was not at your planning meeting understand what students will do, why the activity is worth funding and how you arrived at the amount you are requesting. By the end of your preparation, you should be able to explain the full cost, the money already available for this purpose, the amount still needed and the changes you could make if the award is smaller than requested.

WORKED EXAMPLE

Requested	Group contribution	Total planned cost
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\$330	\$60	\$390
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\$330 + \$60 = \$390

About the examples

The organization, records, prices, decisions and results in the worked examples are invented for learning. No actual vendor quote, campus approval, funding award or event outcome is being represented.

THE DECISION AND THE NEXT STEP

You do not have to make every part of the project sound certain. A room can be pending, a price can be an estimate and attendance can be a planning assumption. The useful skill is being clear about which is which and what you will do next. A confident answer can be, 'I have not confirmed that yet. Here is who I am checking with, and we will not place the order until we have an answer.'

A funding meeting is one part of a longer process. The committee may allocate money for particular costs. Another person or office may need to approve the purchase, vendor or contract. Payment may then happen through a campus order, invoice or another permitted route. Reimbursement is repayment for an eligible personal expense after the required evidence and approvals. Keep these steps separate in your notes, so nobody hears 'we got funding' as permission to spend immediately.

Start with the current application and the office that administers it. Find out which funding round fits your request, who is eligible, what expenses it can cover, what must be submitted and who needs to attend. Ask whether the meeting is an advice session, a formal decision or a chance to explain an appeal. Those purposes call for different preparation. Your advisor can help you find the right contact, but confirm who actually has authority to answer a policy question or approve spending.

Write down the current submission deadline, meeting format, speaking time, required presenters and contact for questions. Also check what happens after an award: when funds become available, which purchases need advance approval, what reporting is required and whether unused money expires or must be returned. These are local questions. The university examples in this chapter are not a calendar or rulebook for your organization.

1

ALLOCATION

Particular costs

2

APPROVAL

Purchase or vendor

3

PAYMENT

Permitted route

YOUR CAMPUS PROCESS

At DePaul, the published SAF-B hearing guidance asks applicants to connect the activity to their organization's mission, explain whom it serves and support the costs. The page also describes a discretionary route reviewed through written submissions. That is a useful example of why 'apply for funding' does not always mean giving the same presentation. Use your own campus's current route and requirements. [1]

TREASURER HUB

Mandatory

Initial budget + advisory meeting

LINKED POLICY PDF

Optional

Revised August 2025 · printed page 6

Towson's Treasurer Hub describes an initial budget, an advisory meeting, a final submission and a hearing. However, the Hub calls the initial budget and advisory meeting mandatory, while the linked Financial Policy PDF, revised August 2025, calls those steps optional on printed page 6. If you find a conflict like this, send both links to the responsible office and ask which requirement controls your application. Save the answer with the packet instead of quietly choosing the easier rule. [2, 3]

Begin with the activity rather than a round dollar amount. Describe who it is for, what participants will actually do and what makes the plan feasible. Then list each cost and the quantity behind it. A line that says 'materials, \$300' is difficult to check. 'Thirty paper kits at \$5 each, \$150' lets another person see the assumption and ask a useful question about it.

EVIDENCE BEHIND THE COSTS

Save the price evidence your local process requires. Record the item or service, supplier, quantity, date checked, delivery cost, taxes or other fees, and whether the price expires. Label a rough estimate honestly. A screenshot of an item price may leave out shipping or a mandatory service charge; ask before treating it as the final total. For services, a funding application does not give you authority to sign an agreement or promise payment.

PRICE EVIDENCE

Item or service	Supplier + quantity
Date checked + expiry	Delivery + taxes + fees

Look at the existing funds as carefully as the new costs. The displayed account balance may include a restricted award, money already promised for another approved purchase or a reimbursement still moving through the system. Princeton’s treasurer guidance, for example, explains that some reimbursement expenses appear in its ledger only after the approval process. Check both the posted records and the pending obligations before saying how much your group can contribute. [4]

Discuss the contribution and fallback plan with the people authorized under your organization’s rules. Decide which costs are essential to the activity and which can change. An optional snack line may be removable; an access arrangement or required safety provision should not be treated as a convenient saving. If a smaller award would make the activity inaccessible or unworkable, say so and explain the remaining gap.

PAYMENT AND EXPLANATION

Agree on the payment route early. If a member cannot afford to pay upfront, handle that privately and ask the finance office about an authorized alternative. Do not build the event around someone lending the organization money. The University of Michigan describes campus purchasing and advance options for some circumstances, with eligibility and approval conditions. Whether those options exist for your group is a question for your own institution. [5]

A CLEAR EXPLANATION

Use the first part of your speaking time to state the request and connect it to the activity. Explain the main cost drivers next, then name any unresolved conditions and the version you could run with less funding. Rehearse with someone who did not help write the application. Ask them to tell you the amount requested, what it would pay for and what still needs confirmation. If they cannot, revise the explanation before adding more slides.

Divide the speaking roles with your co-presenter. One person can explain the activity while the treasurer walks through the figures. Decide who will take notes on questions and conditions. Bring the submitted version of the budget, not a newer spreadsheet that nobody else has seen without an explanation of what changed. Check the totals and make sure both presenters use the same numbers.

Questions about attendance, cost or other funding are chances to explain the plan. Answer the question first, then point to the evidence. If you disagree with an assumption, clarify it respectfully: 'The thirty places are our planning capacity, not thirty confirmed attendees.' If you need to correct a mistake, give the corrected amount and explain whether it changes the request. Avoid defending a number you know is wrong just because it is already on the form.

The amount. The evidence. What still needs confirmation.

THE WORKED MEETING PACKET

The Student Makers Collective is planning a ninety-minute Make Your First Zine workshop. Its purpose is to make hands-on creative activities available without requiring students to own supplies. Participants will learn a simple folding and layout method and make a small booklet. The plan is for thirty students, with free registration open to the campus community. Thirty is a planning quantity, not a claim that thirty people have registered.

The proposed total is \$390. The organization has agreed, under the example’s internal approval process, to contribute \$60 from available unrestricted funds. It is requesting \$330. The request covers materials, shared tools, printed instructions and a \$90 snack option. The workshop can run without snacks at a total cost of \$300, requiring a \$240 award plus the same \$60 contribution.

The event lead has requested a room but has not received a reservation confirmation. The budget assumes no room fee. The treasurer still needs the campus finance office to confirm the purchasing route. No order has been placed, no vendor has been promised payment and no member has been asked to front the costs.

TABLE 1



TABLE 2



TABLE 3



TABLE 4



TABLE 5



TABLE 6



30

planned places

90

minutes

Planning quantity, not confirmed registrations.

THE CONTRIBUTION WE CAN USE

Example account record in USD

$$\text{\$620} - \text{\$400} - \text{\$100} = \text{\$120}$$

Posted – restricted – owed = unrestricted

RESERVATIONS

\\$400

Conference
restricted

**PRINTING
BILL**

\\$100

Still owed

UNPAID

APPROVAL REQUEST

REQUESTED AWARD

\\$330

Not cash already received

FROM EXISTING FUNDS

\\$60

Contribution agreed
for this workshop

$$\text{\$120} - \text{\$60} = \text{\$60}$$

Left uncommitted

THE COMPLETE RECORD

Example account record in USD

Existing funds or obligation	Amount	What it means for this request
Posted account balance	\$620	Starting figure in the example record
Restricted conference award included above	\$400	Reserved for the conference and unavailable for this workshop
Approved unpaid printing bill from an earlier activity	\$100	Still owed and not yet deducted from the posted balance
Unrestricted amount available after those items	\$120	\$620 minus \$400 minus \$100
Contribution agreed for this workshop	\$60	Leaves \$60 uncommitted for other needs

BEFORE PURCHASING

The account balance is not \$620 available for this event. The requested \$330 award is also not included as cash already received. Internal agreement to use \$60 does not settle the campus purchasing authorization.

BUDGET AND A PRICED FALLBACK

Cost and purpose	Quantity	Unit estimate	Line total
Paper kits for participants	30	\$5	\$150
Shared marker sets for six tables	6	\$12	\$72
Shared staplers retained by the organization	6	\$8	\$48
Printed folding and layout instructions	30	\$1	\$30
Optional snacks	30	\$3	\$90
Total proposed cost			\$390
Organization contribution			\$60
Funding requested			\$330

Without the \$90 snack line, the total is \$300.

The full plan is \$13 per planned place: \$390 divided by 30. The workshop without snacks is \$10 per planned place: \$300 divided by 30. These figures describe a planning assumption. They do not establish attendance, learning or cost per actual participant.

WHAT STILL NEEDS CONFIRMATION

Packet item	Status in the practice case	Next action or owner
Budget and existing fund record	Reconciles to the amounts shown above	Treasurer checks against the latest record before the hearing
Cost estimates	All prices are teaching assumptions	In a real request, replace with required quotes and dates
Room reservation and fee	Pending; budget currently assumes \$0	Event lead obtains written confirmation before ordering
Purchasing route and eligible costs	Not yet confirmed	Treasurer asks campus finance before any commitment
Participant access arrangements	Needs to be checked as registration opens	Event lead consults the relevant campus office and updates the plan

For this exercise, the unit estimates include all expected taxes and delivery fees. A real application needs the actual evidence and current local treatment of those costs. The instruction estimate covers the printed materials only; accessible formats and any needed arrangements must be checked with participants and the relevant campus office before the plan is finalized. Any cost of the agreed access arrangements belongs in the plan before the event is confirmed; it is separate from the optional snack line.

THE EVIDENCE IN THE EXAMPLE

The shared supplies are planned purchases because the example inventory check found no suitable sets available to borrow. After the workshop, the event lead will return them to the organization's labeled supply box and update the inventory. In a real packet, attach the inventory check or confirmation rather than claiming that borrowing is impossible without asking.

A SPOKEN OPENING

We are requesting \$330 toward a \$390 beginner zine workshop, with \$60 from our organization's available unrestricted funds. We have planned supplies for thirty free places. The activity gives students a way to try booklet design without bringing their own materials. Most of the budget is participant paper, shared tools and instructions. Snacks are the one optional \$90 line, so a \$240 award would let us run the workshop without them. Thirty is our planning capacity, not confirmed attendance. The room and purchasing route are still pending, and we will confirm both before ordering. The budget and the remaining questions are in the packet.

LISTENER CHECK

Name the amount requested, what it pays for and what still needs confirmation.

THE HEARING REHEARSAL

Why do you need new funding when the account shows \$620?

The \$620 includes \$400 restricted to a conference and \$100 owed for an earlier printing bill. That leaves \$120 available without those restrictions or commitments. Our group has agreed to contribute \$60 to this workshop and leave \$60 uncommitted. The fund record shows those amounts separately.

How did you choose thirty places?

Thirty is the capacity we can support with the planned materials and six working tables. It is not an attendance forecast backed by registrations yet. We will review registration before any changeable order and check what the funding terms allow if quantities change.

Can you run the activity with a smaller award?

Yes. A \$240 award plus our \$60 contribution covers the \$300 materials-and-instructions version. We would remove snacks. We have not priced a viable version below that amount, so we would need to check options rather than promise the same activity at a lower cost.

$$\text{\$240} + \text{\$60} = \text{\$300}$$

THE HEARING REHEARSAL

Why are the shared supplies part of the request?

The example inventory check found no suitable sets to borrow. The markers and staplers support six tables and will stay with the organization afterward. We will ask whether reusable supplies are eligible under this fund's rules.

What if the room costs money or is unavailable?

That is still unresolved. We will not commit to the purchases until the room is confirmed. If there is a fee or the space is unavailable, we will revise the plan with the event lead and ask whether a changed request or date is permitted. We are not assuming the committee will cover an extra cost.

Who will buy the materials?

The treasurer is checking the authorized route with campus finance. No student has agreed to pay personally. We need to know who can place the order, which vendor process applies and what evidence is required before we can give a confirmed answer.

Room and purchasing route remain open.

THE PARTIAL AWARD

Before leaving the meeting, read back what you understand: the amount, the permitted costs, any conditions and the next step. Ask where the written decision will appear. Record the answer separately from your interpretation. If a verbal answer is unclear, request clarification through the stated channel before treating it as authorization.

For this practice case, suppose the written decision awards \$240 for paper, shared supplies and printing, with no food funding. It requires the room and purchasing arrangements to be confirmed before spending. These example conditions are not rules taken from a real university. The treasurer records the \$90 gap from the original \$330 request and takes the priced no-snacks option back through the organization’s decision process. The group agrees to that revision.

Revised cost	Award allocation	Organization funds	Total
Paper kits	\$90	\$60	\$150
Shared marker sets	\$72	\$0	\$72
Shared staplers	\$48	\$0	\$48
Printed instructions	\$30	\$0	\$30
Total without snacks	\$240	\$60	\$300

THE DECISION RECORD

Do not add the original \$330 request to the \$240 award in your working budget. Mark the original request as decided, retain its history and use the \$240 award as the current funding decision. If transfer or access is still pending, show that status separately. Then record each purchase only through the approved route. When a recorded commitment is paid, update it to paid rather than counting the commitment and payment as two costs.

For the practice packet, the event lead is responsible for confirming the room, and the treasurer will follow up with campus finance. The secretary or other designated recordkeeper saves the group's decision to run the revised version. The team agrees a check-in before the last date when orders can arrive. In your real packet, replace those roles and that check-in with the actual people, permissions and dates. An advisor's involvement does not by itself establish purchasing authority.

A short update to members could say: 'The committee awarded \$240 for materials and printing. With our \$60 contribution, we can run the \$300 workshop without snacks. The room and payment route still need confirmation, so please do not order anything or promise reimbursement yet. The event lead and treasurer are checking those points, and we will share the confirmed plan at our next agreed check-in.' This is an example to adapt to the decision actually received.

If the award is zero or the conditions make the plan unworkable, ask for the recorded reason and check whether clarification, resubmission or appeal is available. Those routes have their own rules. You can ask what evidence would resolve a question without arguing that the committee is obliged to fund the event. Give your organization the real options, such as a revised activity, another eligible fund or postponement, and identify who decides.

REQUEST HISTORY

\$330 • Decided

CURRENT AWARD

\$240

THE CLOSING REPORT

After the activity, compare the approved version with what was actually spent. Match invoices, receipts and payment confirmations to the relevant record. Check for unpaid bills, refunds, unused funds and any required report. An amount below budget is useful information, but explain why it changed before calling it a success.

FINAL COST RECORD

Paper	\$142
Markers	\$68
Staplers	\$48
Instructions	\$27
Actual cost	\$285

Revised budget

\$300

Award used

\$225

Unused award: \$15

In a further worked-example step, suppose the workshop goes ahead after the outstanding conditions are resolved. Final costs are \$142 for paper, \$68 for markers, \$48 for staplers and \$27 for instructions, totaling \$285. The organization contributes the agreed \$60 and the award covers \$225. That leaves \$15 of the \$240 award unused. The treasurer asks how that \$15 must be handled rather than moving it to another activity without permission.

Suppose twenty-four students actually attend. The report can say that costs were \$15 below the revised \$300 budget because final prices were lower, while attendance was six below the thirty places planned. Actual cost per attendee was about \$11.88, compared with the \$10 cost per planned place. Neither number proves whether students learned the skill. A useful short review would also explain the participation result and collect appropriate feedback about the activity.

Keep the submitted request, written decision, revised budget, payment evidence and closing report together in the approved records location. Add a brief note for the next officer about what took longer than expected and which office answered the difficult question. A successor should be able to follow the decision, not just find a folder full of unexplained files.

PREPARE YOUR OWN PACKET

Use the worked case as a check on your explanation, not a set of numbers to copy. Draft one paragraph stating the activity, the total cost, the contribution your group can actually use and the amount requested. Add the cost evidence and a table that reconciles those figures. State which version remains viable if funding is reduced and which facts are still unresolved.

Before submitting, ask a teammate to explain your request back to you. Can they identify the amount needed and why the account balance does not necessarily cover it? Can they find the evidence for a cost, name the next owner of a missing fact and distinguish an award from permission to purchase? If a question exposes a gap, fix the packet or label the gap clearly. The aim is to make a decision possible without asking the committee or your teammates to guess.

READ THE OFFICIAL EXAMPLES

- 1 DePaul Student Activity Fee Board Funding**
- 2 Towson Treasurer Hub**
- 3 Towson Student Government Association Financial Policy**
- 4 Princeton Treasurer Resources**
- 5 University of Michigan Purchase and Reimbursement Options**

Official examples were reviewed October 2, 2026. The worked packet and practice language are original teaching examples. Check your institution's current funding, contract, purchasing and reimbursement requirements before applying them. The chapter is designed for a local practice review with a current treasurer or campus finance contact.