

Student Organization Budget Planner: Instruction Guide

Welcome to the Student Organization Budget Planner. Effective financial planning is key to the success of your organization's events, programs, and travel. This guide provides step-by-step instructions for using this template effectively, customizing it for your specific needs, and managing multiple events within a single spreadsheet file.

1. How to Use the Template

The budget planner is structured to help you track your expenses and revenues from initial planning through final execution. Follow these core practices to ensure accurate tracking:

- **Program Name & Date:** Always fill out the Program Name and Date fields at the top of your sheet to clearly identify the budget.
- **Unit and Cost/Unit:** For items you are purchasing in multiples (e.g., 50 t-shirts, 10 pizzas), enter the quantity under "Unit" and the price per item under "Cost/Unit".
- **Planned Column:** Enter your estimated costs in the "Planned" column during the initial proposal phase before any money is spent. Formulas will automatically calculate totals based on your Units and Cost/Unit where applicable.
- **Notes/Links:** Use this column to paste links to vendor quotes, or specific item details to keep all your verification documents organized.

2. Managing Multiple Events & Trips (Using Tabs)

Crucial Rule: Do not create separate spreadsheet files for each event. Instead, you should maintain a **single master budget sheet** and create individual tabs (worksheets) at the bottom for each event or travel instance.

To create a tab for a new event or trip:

1. Look at the bottom of your spreadsheet screen where the sheet tabs are listed.
2. Right-click on the original master budget template tab.
3. Select **Duplicate** from the pop-up menu.
4. Double-click the newly created tab and rename it clearly based on the event or trip (e.g., "Fall Leadership Conference 2026" or "Annual Spring Banquet").

3. Customizing Your Sheet & Adding Lines

Every student organization has unique needs. You are highly encouraged to personalize your

budget tabs and add additional lines whenever the default list does not capture your specific items.

- **Adding Additional Rows:** If you need more items under a specific category (like adding a row for a specific dietary food requirement), right-click on the row number where you want to expand, and select **Insert 1 row above** or **Insert 1 row below**.
- **Maintaining Formulas:** When adding new rows or tabs, make sure to copy down any mathematical formulas from adjacent rows or tabs, so your totals continue to calculate correctly.
- **Personalized Tabs:** Feel free to create a dedicated personalized tab to track overall organization summaries, historical dues collection, or member rosters if it helps your internal planning.

4. Understanding Budget Categories

To keep your financial reporting consistent, align your items with the pre-established categories in the template:

Category Group	Description & Included Items
VENUE/SITE	All costs associated with securing a physical space, including rental fees, required security personnel, cleanup/custodial fees, and parking reservations.
FOOD/DRINK	Catering for attendees, general beverages, and specific meals provided to volunteers, performers, or working staff.
PRODUCTION/LOGISTICS	Operational elements such as contractor or artist fees, event decor, general supplies, equipment rentals, specific activity materials, and technical/AV labor.
PROMOTION	Marketing expenses to drive attendance, including promotional giveaways, apparel/t-shirts, printing, and food/drink items explicitly used for marketing events.
TRAVEL	All expenses related to off-campus trips or bringing guests in, encompassing registration

Category Group	Description & Included Items
	fees, flights, lodging/hotels, local transportation (ground travel), and travel meals.
REVENUE	All incoming funds supporting the program, such as internal campus sponsorship allocations, transfers from your foundation account, or external ticket/merchandise revenue.

Reminder: Regularly update your sheet as planned estimates turn into actual numbers to prevent overspending and ensure a successful post-event financial review!