Documentation Examples

Here you will find examples of adequate vs. poor SAF Budget Request documentation. Please keep in mind that this is not an exhaustive list, but rather a way for RSOs to reference high quality documentation when preparing for their own budget request submission.

The examples are organized by general type. The type will be in **Bold and Underlined Maroon**.

Some of the examples reference “**screenshots**”. This is the term for taking a picture, via your computer, of your current screen view. It can be helpful if you are, for example, creating an online “cart” in order to show the total cost of a purchase or online order.

On a PC:

1) **Press the "Print Screen" button on your keyboard.** The "Print Screen" button may be labeled "PrtScn", "Prnt Scrn", "Print Scr", or something similar. On most keyboards, the button is usually found between the "F12" and "Scroll Lock" keys. On laptop keyboards, you may have to press the "Fn" or "Function" key to access "Print Screen".
2) **Paste the screenshot.** Once you’ve made the screenshot, you will need to paste it to a program in order to see it. You may consider Microsoft Word or Paint.

On a Mac:

1) **Hold down “Command” and “Shift” and press “3”**.
2) **Paste the screenshot.** Once you’ve made the screenshot, you will need to paste it to a program in order to see it. You may consider Microsoft Word or Paint.
Guest Speakers/DJs/Performers

Good Examples

Documenting the cost of a guest to visit campus

This Bid Form is available on OrgSync and on SAGA’s website. You can send this form to a guest speaker/performer/etc (or to their agent/representation) in order to obtain a quote for bringing them to campus. This bid form is not required or part of a contract, but it works great for documenting the cost of a visit on a budget request.
You can use the screenshot of an email correspondence to validate your requested funding amount. The screenshot above is good quality: the Committee can see the original message, as well as the agent’s response. (An email sent to the guest/agent, without a response included, is not valid documentation; it does not show the amount that the guest/performer requires. It only shows that you sent an initial email).

In this example, the agent also specifies that a hotel must also be provided. This organization’s budget request should have a line item for $850 for the engagement fee, and another line item (along with separate documentation) to account for the cost of the hotel in their budget request.
Travel and Lodging

Good Examples

Documenting driving distance

This organization was paying to have a speaker drive up from UIUC. They used this website to calculate exactly how much the gas would cost, and submitted a screenshot so they could request the appropriate amount.
This organization used this hotel’s website to get a quote for how much the accommodations for a performer would cost on the specific night.
Documenting flight cost

This organization was flying in a speaker from Columbus, Ohio. By using this travel website to calculate exactly what the flight would cost and taking a screenshot, they were able to request the appropriate amount.
Simply providing documentation that indicates a website or vendor you plan to use is not sufficient. This screenshot does not provide any indication of cost. A screenshot from Orbitz could be used as documentation, but it would need to reflect more specific information than this example.
General Supplies

**Good Example**

This organization compiled all of the general supplies they planned to purchase through an online vendor and took a screenshot of their shopping cart. This allows the Allocations Committee to verify 3 important things: cost per item, quantity of each item, and total cost overall.
Bad Example

Instead of including anything specific for their general supplies, this organization uploaded a screenshot from a previous budget cycle that had been approved. Unfortunately, this does not explain to the Allocations Committee why the organization is requesting a specific amount; it is not, therefore, sufficient documentation.
Food and Catering

**Good Examples**

<table>
<thead>
<tr>
<th>Donuts</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dozen Donuts</td>
<td>$8.49</td>
<td></td>
</tr>
<tr>
<td>Half-Dozen of Donuts</td>
<td>$5.29</td>
<td></td>
</tr>
<tr>
<td>Dozen Donuts and Box O'Joe</td>
<td>$22.99</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Munchkins</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>25-Count Munchkins</td>
<td>$5.29</td>
<td></td>
</tr>
<tr>
<td>50-Count Munchkins</td>
<td>$8.49</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bakery</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dozen Bagels</td>
<td>$9.99</td>
<td></td>
</tr>
<tr>
<td>Half Dozen Bagels</td>
<td>$5.99</td>
<td></td>
</tr>
<tr>
<td>Bagel (Each)</td>
<td>$1.19</td>
<td></td>
</tr>
<tr>
<td>Cream Cheese (2 Oz.)</td>
<td>$0.99</td>
<td></td>
</tr>
<tr>
<td>Cream Cheese (8 Oz.)</td>
<td>$3.49</td>
<td></td>
</tr>
<tr>
<td>Dozen Muffins</td>
<td>$14.99</td>
<td></td>
</tr>
<tr>
<td>Muffin (Each)</td>
<td>$1.99</td>
<td></td>
</tr>
</tbody>
</table>

**Dunkin Donuts**

<table>
<thead>
<tr>
<th>Item</th>
<th>Qty</th>
<th>Price</th>
<th>Del</th>
</tr>
</thead>
<tbody>
<tr>
<td>25-Count Munchkins</td>
<td>-5</td>
<td>26.45</td>
<td>X</td>
</tr>
<tr>
<td>Box o'Joe</td>
<td>-5</td>
<td>79.95</td>
<td>X</td>
</tr>
<tr>
<td>Cream Cheese (8 Oz.)</td>
<td>-2</td>
<td>6.98</td>
<td>X</td>
</tr>
<tr>
<td>Cream Cheese (8 Oz.)</td>
<td>-1</td>
<td>3.49</td>
<td>X</td>
</tr>
<tr>
<td>Cream Cheese (8 Oz.)</td>
<td>-1</td>
<td>3.49</td>
<td>X</td>
</tr>
<tr>
<td>Dozen Bagels</td>
<td>-5</td>
<td>49.95</td>
<td>X</td>
</tr>
</tbody>
</table>

Subtotal: 170.31  
Tax: 17.88  
Delivery Charge: 3.00  
Total: $191.19

Similar to general supplies, some food vendors allow you to create an online shopping cart, which works great for documentation purposes.
This screenshot of a menu works well for documentation thanks to the red circles the organization has provided. **Along with this documentation, the organization indicated in their budget request the number of 24” Cheese pizzas they planned to purchase.** The Allocations Committee was able to 1) see the price of one pizza, 2) see how many pizzas the organization planned to order, and 3) arrive at the total funding amount requested.

This example, therefore, is valid documentation. A blank menu, without the circles or the quantity information, would not be valid documentation, as shown below.
A common documentation error is to submit a menu without indicating which items they plan to purchase. This makes it impossible for the Allocations Committee to understand how the organization arrived at the particular amount of funding being requested. If submitting a menu screenshot, make sure to either circle the items you plan to purchase and indicate quantity, or accompany it with a spreadsheet that breaks down the items you plan to buy.