

Introduce yourself in the chat!
What is your institution and
where in the world are you?

*I'm in Philly, but originally from
Birmingham, AL!*

Finance

- Understand finance and its use on the platform.
- Define key terms used in the platform
- Demonstrate the flow from allocation, to expenditure, to reconciliation

*This webinar is suited to those who want
to learn about the flow and use of
Finance on the platform.*

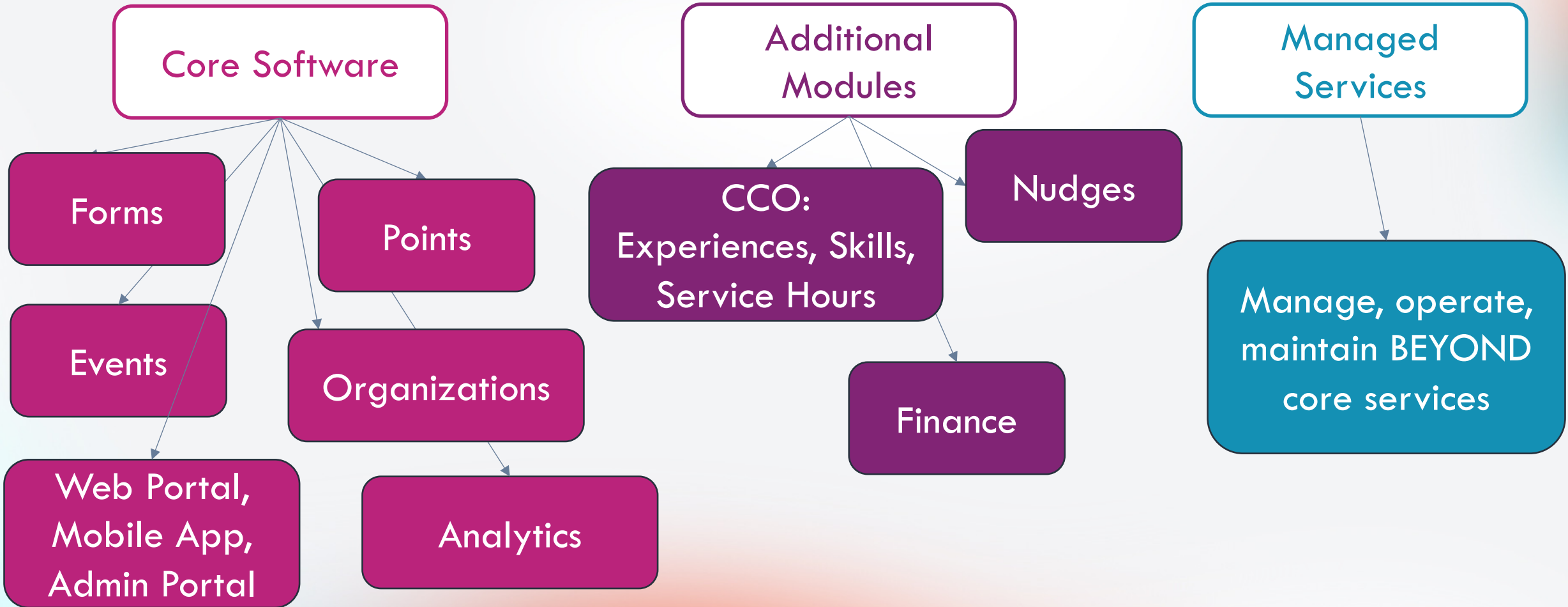
Agenda

1. Intro
2. Finance FAQs
3. Finance Flow
4. Demo
5. Q&A
6. Close



What is Finance?

Modern Campus Involve



Involve Finance

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Finance CREATE ▾

[BUDGET](#) [TRANSACTIONS](#) [REQUESTS](#)

\$60,349.18
Available
\$950.82
Spent

AVAILABLE ▾
ALLOCATED ▾

Budget	Available	Allocated	Account	
+ Student Organizations	\$11,300.00	\$11,300.00	1111	⋮
- CU Office of Campus Life ↗	\$49,049.18	\$50,000.00	2222	⋮
- Orientation	\$567.18	\$1,500.00		⋮
Orientation - Food	\$0.00	\$0.00		⋮
Orientation - Entertainment	\$0.00	\$0.00		⋮
Campus Wide Events	\$1,000.00	\$1,000.00		⋮

Finance FAQs

Is this this real money?

- This is NOT connected to a bank, debit, or credit card
- Finance is for tracking
- Transparency for student leaders and account admin



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+

Finance

CREATE ▾

BUDGET
TRANSACTIONS
REQUESTS

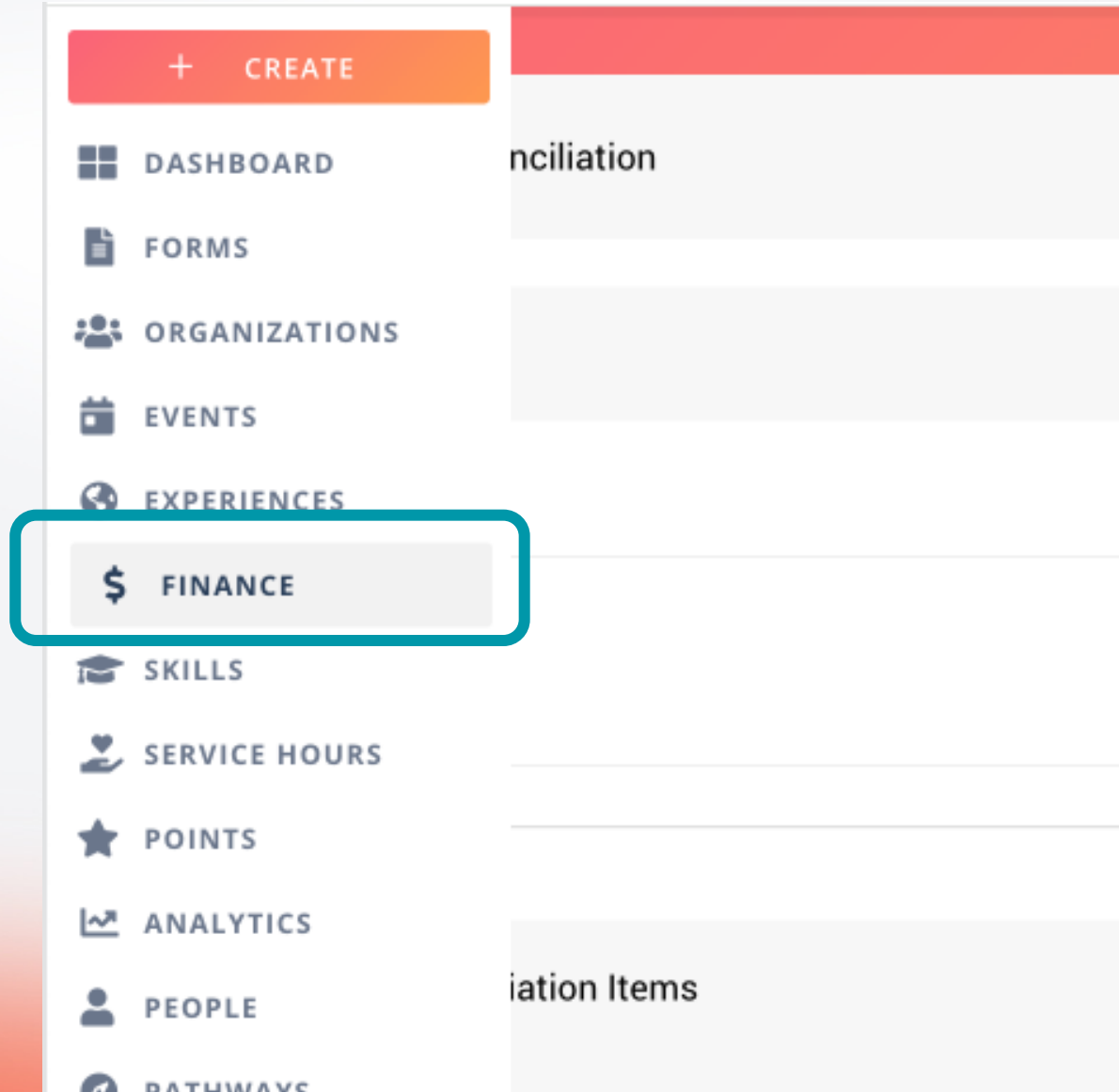
\$3,015.99 <small>Request To Allocate</small>	\$6,519,768.29 <small>Available</small>	\$1,976.00 <small>Request To Spend</small>	\$21,334.00 <small>Approved To Spend</small>	\$10.00 <small>Request To Reconcile</small>	\$5,025,639.99 <small>Spent</small>
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- Budget
- Allocation
- Deposit
- Transfer
- Expenditure
- Reconciliation

Does everyone have Finance?

- Not everyone has Finance!
- Interested? Speak with your account manager.

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Why use Finance?

- Student org leaders can track and see their money
- Know how students are spending money
- Pair with event data to evaluate spending
- Eliminate any remaining paper processes

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The screenshot displays the 'Finance' dashboard with a teal header and a green sidebar. The main content area is divided into three tabs: 'BUDGET', 'TRANSACTIONS', and 'REQUESTS'. A 'CREATE' button is visible in the top right corner. Below the tabs, a table shows financial data:

\$3,015.99 Request To Allocate	\$6,519,768.29 Available	\$1,976.00 Request To Spend	\$21,334.00 Approved To Spend	\$10.00 Request To Reconcile	\$5,025,639.99 Spent
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A dropdown menu is open on the right side, listing the following options: Budget, Allocation, Deposit, Transfer, Expenditure, and Reconciliation.

How do I request to spend money?

The screenshot displays the 'Finance' section of the Modern Campus system. The page title is 'Finance' with a sub-header 'SGA Allocation'. There are three tabs: 'BUDGET', 'TRANSACTIONS', and 'REQUESTS'. A yellow arrow points to a 'CREATE TRANSACTION' dropdown menu, which lists 'Allocation', 'Deposit', 'Transfer', and 'Expenditure'. Below the tabs, there are two summary cards: 'Total Allocated' with a value of '\$1,000' and 'Requests' with a value of '2'. At the bottom, a green bar indicates '\$994.00 Available'. A vertical sidebar on the left contains various navigation icons, including a plus sign, a grid, a document, a group of people, a calendar, a globe, a dollar sign, a trash can, a heart, a star, a chart, and a person icon.

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Can I reset my budget?

- Yes!
- Contact support (involve-support@moderncampus.com) to reset to 0.
 - Anytime
 - Most likely, start of semester!

Quick Tips

Money can only move from “parent” to “child” budgets.

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Parent

Child

Transfer

Amount *

Budget Amount Available

Student Organizations \$9820.00 ×

Transfer To *

<input type="checkbox"/>	Student Organizations	\$11,300.00	\$11,300.00	1111
<input checked="" type="checkbox"/>	Francais s'il vous plait?	\$640.00	\$640.00	
<input type="checkbox"/>	Dog Walkers of CU	\$0.00	\$0.00	
<input type="checkbox"/>	The Creme de Bananas	\$840.00	\$840.00	
<input type="checkbox"/>	Friends of Dorothy	\$0.00	\$0.00	
<input type="checkbox"/>	Trashy Cricketinis	\$0.00	\$0.00	
<input type="checkbox"/>	(Inactive) Walking Around	\$0.00	\$0.00	

Assign Finance Permissions

- Admin
 - Turn on in user profile
- Student Org Leader
 - Assign in user profile
 - Rights will transfer during transition/registration

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Training Kelsey STUDENT PORTAL

Good morning, Morrie!

Let's do something.

It's been 305 days since you've created an event. [Create one now.](#)

Looks like you haven't made a form yet. [Create one now.](#)

The 'Food Pantry' organization doesn't have any members. [Invite someone.](#)

Action Items

- The organization "Dog Walkers of CU" needs your approval.
- The timeline "5 Service Hours" needs your approval.
- The organization "Cricket Watercolor Club" needs your approval.
- The organization "Delta Delta Delta" needs your approval.
- The organization "Walking Around" needs your approval.

Help

Finance Admin Permissions

- See all budgets
- Transfer funds between budgets

The screenshot displays a user interface for managing roles. At the top right, there is a 'REMOVE' button. Below it, a section titled 'Role' contains a dropdown menu currently showing 'Campus Administrator'. A teal rounded rectangle highlights this dropdown. Below the role section is a section titled 'Additional Rights' which contains three unchecked checkboxes: 'Create Categories', 'Create Organizations', and 'Edit Organizations'.

Finance Admin Permissions

- See all budgets
- Transfer funds between budgets
- Approve requests

- Add Attendees via Web
- Add Bulk Attendees via Web
- Add Members Without Invite
- Set Event Dates in the Past
- Edit Feature Settings
- Manage Finance
- Edit Finance
- Download Smart Transcript

Student Org Leader Permissions

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Role REMOVE

Role

Organization Administrator

Organizations

Bird Watching Club

Additional Rights

- Edit Organizations
- Create Events
- Delete Events
- Event Approval
- Create Users

Student Org Leader

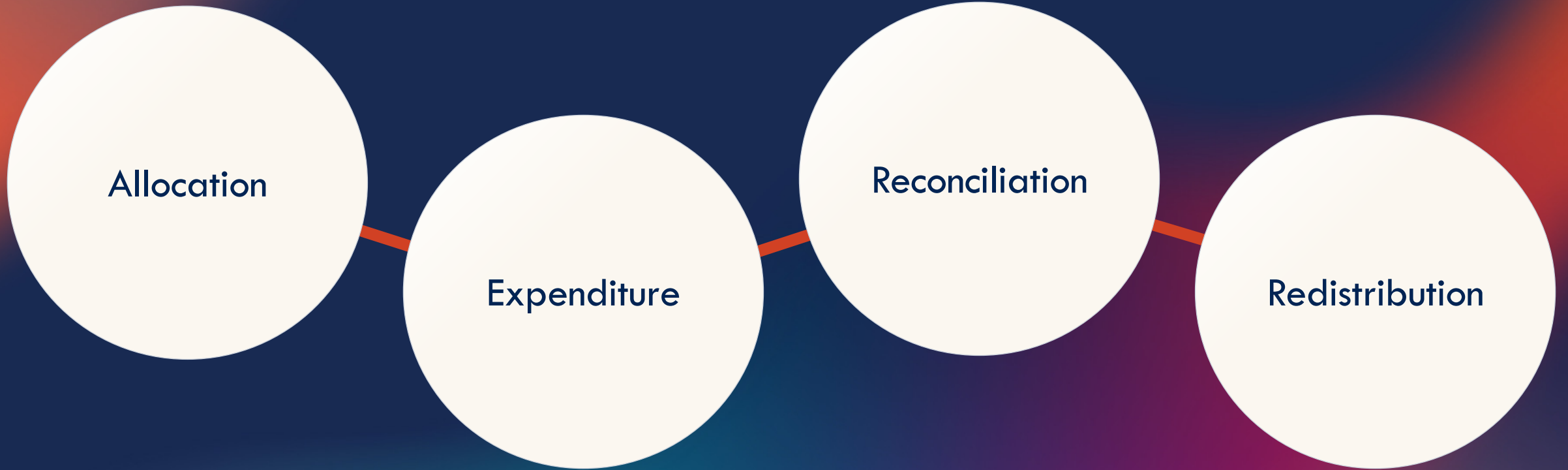
- Submit requests
- *Do NOT need “Edit Finance” access

- Event Approval
- Create Users
- View Person Profiles
- View Student Numbers
- Add Attendees via Web
- Add Bulk Attendees via Web
- Add Members Without Invite
- Set Event Dates in the Past
- Manage Finance
- Edit Finance
- Download Smart Transcript

Demo

- Add admin permission
- Add student org leader permission

Finance Flow



Allocation

We'd like some money for our puzzle club. Can you put some in our budget?

Expenditure

We have a **PLAN** to spend our money on new puzzles. Does this estimate look okay?

Reconciliation

We bought the new puzzles! Here are the receipts for the exact amount we spent!

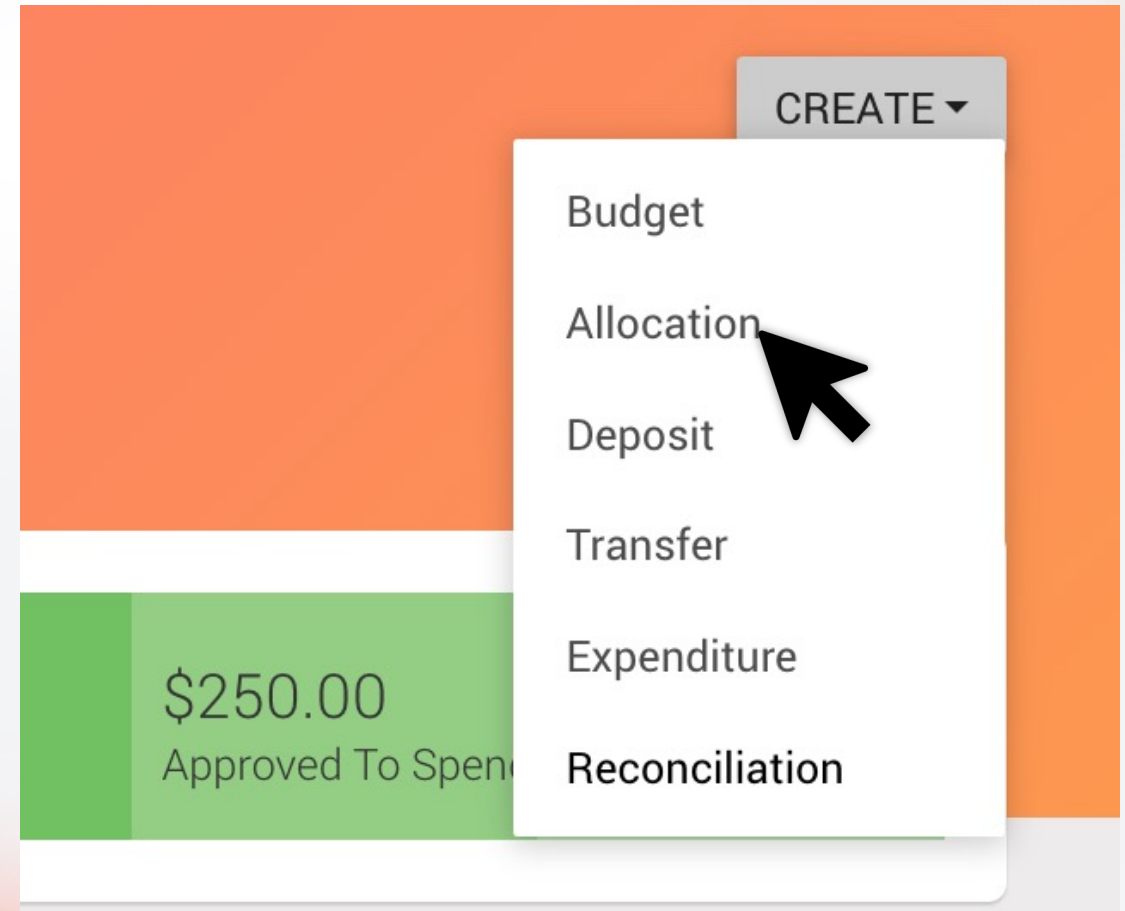
Redistribution

Left over money goes back to the puzzle club budget.

Allocation

I want some money for my organization please!

- Create an Allocation request
- Indicate...
 - What the money is for
 - Where it's coming from
 - How much you need



Create Allocation

SUBMIT FOR APPROVAL

Details

Title *

Puzzler Budget 2025

Description

Requests

ADD

Title *

Puzzler Budget 2025

Memo *

Puzzler Budget 2025

Budget *

Amount * ▲

<input type="checkbox"/> Student Organization	\$11,200.00	\$11,300.00	1111
Francis s'il vous plait?	\$540.00	\$640.00	
Dog Walkers of CU	\$0.00	\$0.00	
The Creme de Bananas	\$840.00	\$840.00	

Select your club budget! Where do you want the money to go?

Create Allocation

SUBMIT FOR APPROVAL

Details

Title *

Puzzler Budget 2025

Description

Requests

ADD

Title *

Puzzler Budget 2025

Memo *

Puzzler Budget 2025

Budget *

Puzzlers

Amount * ▲

\$1,000.00

Allocation Attachment

Upload File



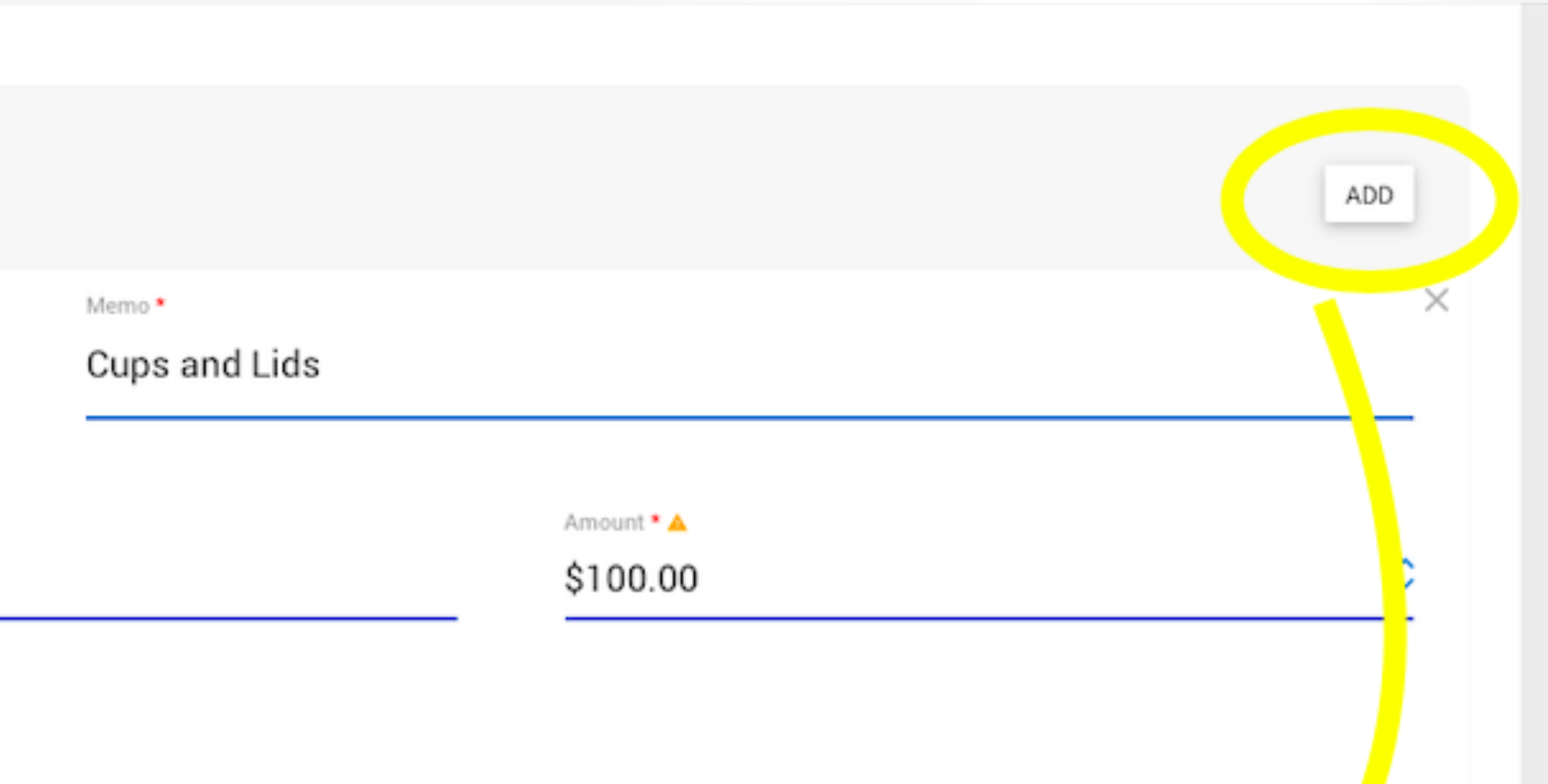
Allocation Total ▲

\$1,000.00



How much money do you want in the pot?

You can make multiple requests at once!



A screenshot of a web form for creating a request. The form has a light gray header bar with an 'ADD' button on the right, which is circled in yellow. Below the header, there is a 'Memo' field containing the text 'Cups and Lids'. To the right of the memo field is a close button (X). Below the memo field is a horizontal blue line. Underneath this line, there is an 'Amount' field with a red asterisk and a yellow triangle icon, containing the value '\$100.00'. To the right of the amount field is a blue double arrow icon. A yellow line extends from the bottom of the 'ADD' button down towards the amount field.

Final Approver!

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Create Allocation SUBMIT FOR APPROVAL

Approval Prompt Response

Choose Budget(s) to Debit
Select budget(s) to fulfill the request(s).

Budget	Amount	Debit Budget
Student Organizations >> Puzzlers	\$1,000.00	

Debit Budget dropdown menu options:
Student Organizations \$11,200.00 \$11,300.00 1111

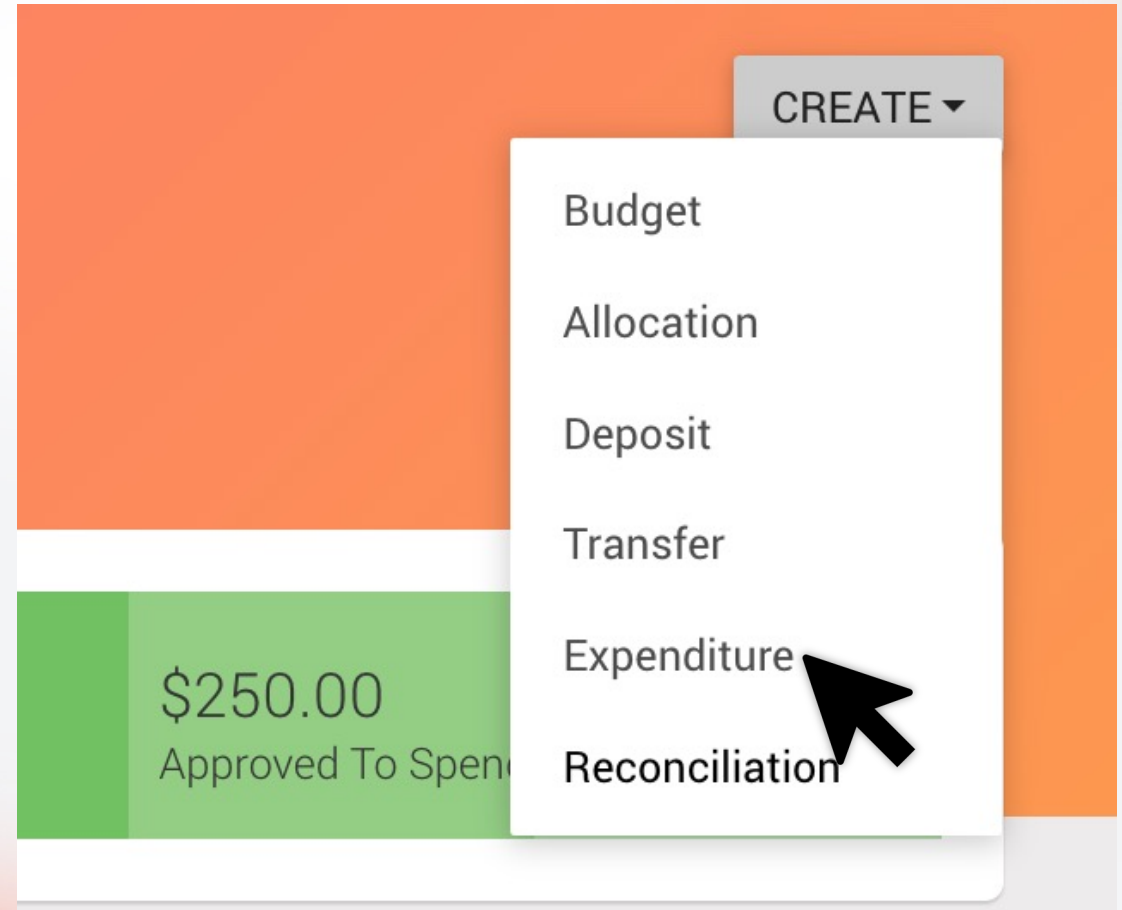
CLOSE **APPROVE**

Make sure to select the debit account before approving!

Expenditure

I'm ready to spend the money now!

- Create an Expenditure request
- Indicate...
 - What the money is for
 - Where it's coming from
 - How much you need



Expenditure Requests Notes

- You **CANNOT** indicate more money that is **ALREADY** in the budget!
 - Need more?
 - Make another Allocation request!
- Once this money is approved it is **LOCKED** and cannot be used for other expenses.

Budget *
Budget

Francais s'il vous plait?

Amount Available ⚠

\$640.00



Create Expenditure

SUBMIT FOR APPROVAL

Details

Title *

New Puzzles

Description

Expenditure Items

ADD

Title *

Puzzles

Memo *

10 New Puzzles

Budget *

Budget

Expenditure Attachment

Upload File



Amount *

Amount ▲

Itemized View

Vendor

Name

Description

Address

City

State

Contact

Email

Phone

Student Organizations	\$11,200.00	\$11,300.00
Francais s'il vous plait?	\$540.00	\$640.00
Dog Walkers of CU	\$0.00	\$0.00
The Creme de Bananas	\$840.00	\$840.00
Friends of Dorothy	\$0.00	

Help

Where is the money coming from?

Details

Title *

New Puzzles

Description

You will have any money that you have already requested to allocate!

CU Methodists	\$0.00	\$0.00
(Inactive) Roller Derby	\$0.00	\$0.00
Puzzlers	\$1,000.00	\$1,000.00
Francais s'il vous plait?	\$0.00	\$0.00
CU Office of Health and Wellness	\$0.00	\$0.00



Create Expenditure

SUBMIT FOR APPROVAL

- Preview Response
- Save as Draft
- Submit Without Approval



Details

Title *

New Puzzles

Description

Expenditure Items

ADD

Title *

New Puzzles

Memo *

10 New Puzzles

Budget *

Budget

Puzzlers

Amount Available ▲

\$1000.00



Expenditure Attachment

Upload File



Amount *

Amount ▲

\$150.00



Itemized View

Vendor

Name

Description

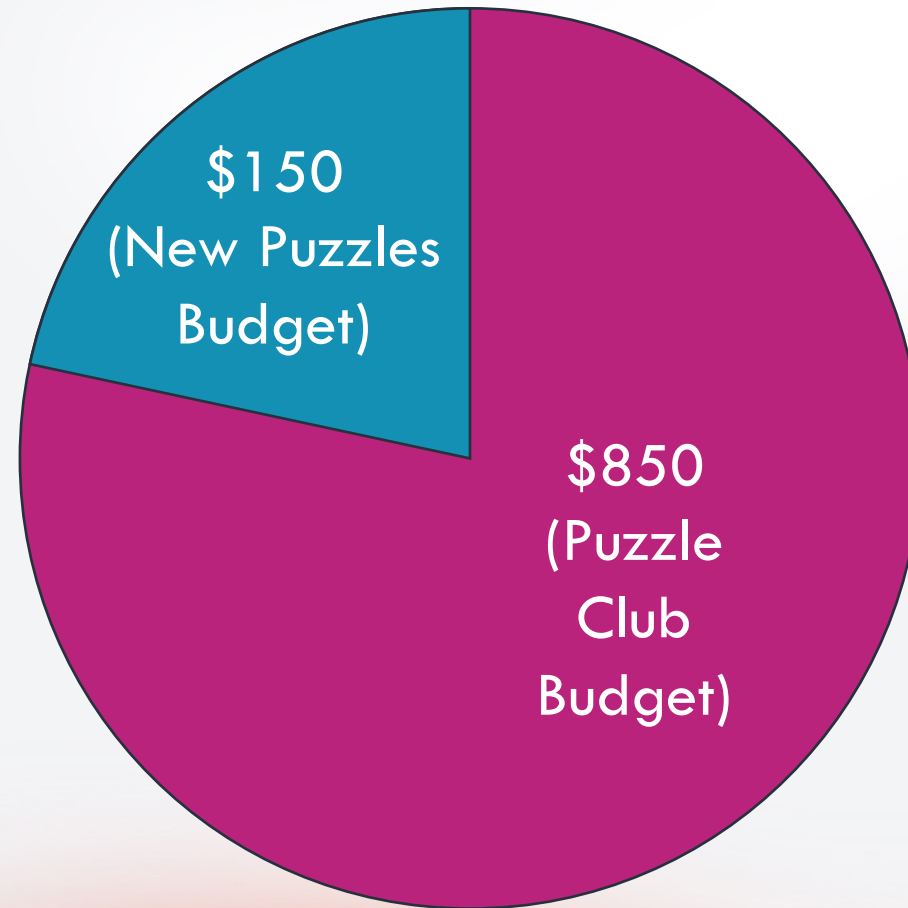
Submit!

Puzzler Club Budget



Puzzler Club
Budget,
\$1,000

After Expenditure Approval

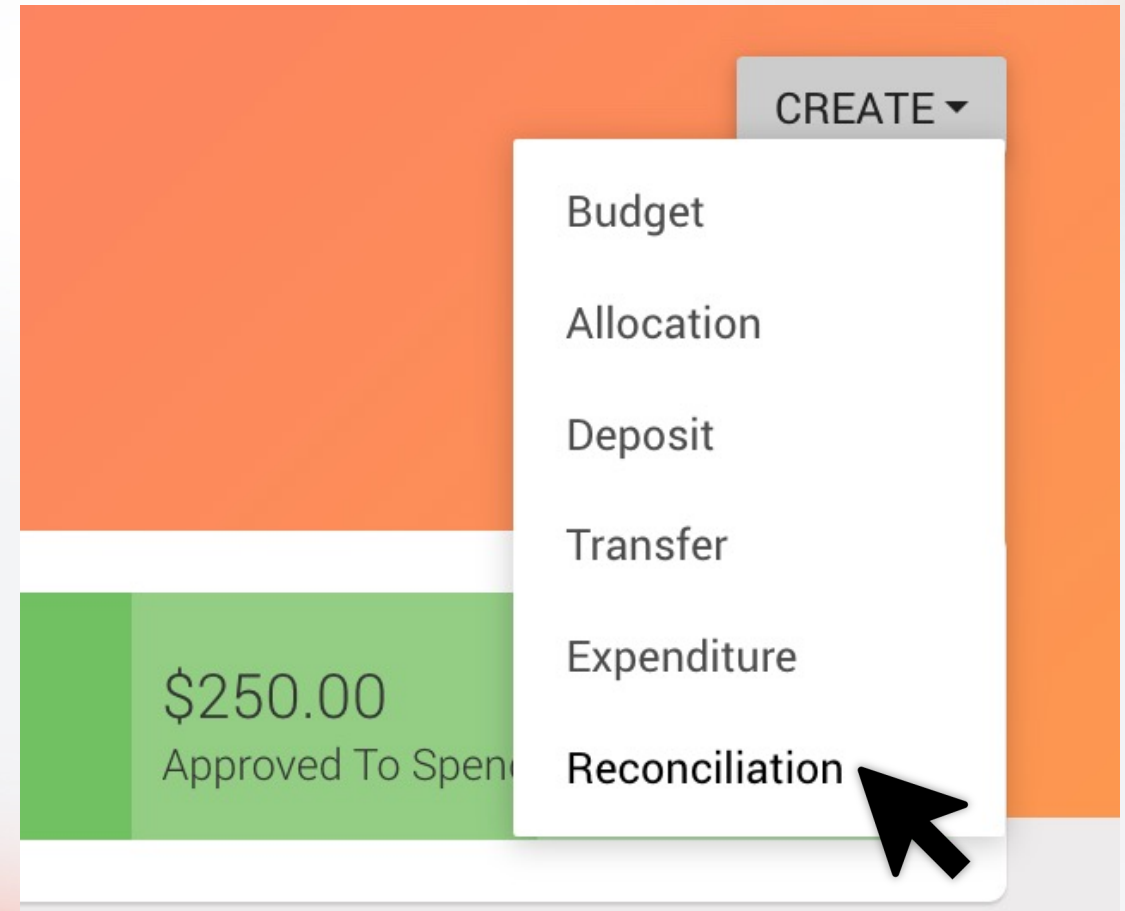


Reconciliation

Reconciliation

- Create a Reconciliation request
- Indicate...
 - The EXACT amount spent
 - What was purchased
 - Receipts etc.

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What did you buy?

How much?

Which approved expenditure?

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Create Reconciliation

Details

Title *

Notes

Anything else?

Reconciliation Items

Approved Expenditures *

Budget

Actual Amount Spent *

ADD

Memo *

Reconciliation Attachment

Upload File

Create Reconciliation

SUBMIT FOR APPROVAL

Details

Title *

New Puzzlers

Notes

Reconciliation Items

Approved Expenditures *
Budget

Actual Amount Spent * ▲

\$0.00

Puzzlers

Expenditures

Francais s'il vous plait?	\$540.00	\$640.00
Puzzlers	\$850.00	\$1,000.00

Reconciliation Attachment

Upload File

ADD

Select your club budget! Where did you spend the money for?



Create Reconciliation

SUBMIT FOR APPROVAL

Details

Title *

New Puzzles

Notes

Reconciliation Items

Approved Expenditures *
Budget

Puzzlers

Expenditures

New Puzzles

Actual Amount Spent * ▲

\$0.00

Memo *

Reconciliation Attachment

Upload File

ADD

You will ONLY be able to select from approved expenditures!

Create Reconciliation

SUBMIT FOR APPROVAL

Details

Title *

New Puzzles

Notes

Reconciliation Items

Approved Expenditures *
Budget

Expenditures

Amount ▲

Actual Amount Spent * ▲

\$140.00

Puzzlers

New Puzzles

\$150.00

Memo *

Reconciliation Attachment

Upload File

How much did you ACTUALLY spend?

After Reconciliation Approval



\$860
(Chess Club
Budget)

Finance Platform Demo

Q&A

Please put your questions in the Q&A box.
I'll get to as many as possible and follow up via
email if more research is needed!

Thank You

See you next month!

Don't attend
events.

Haven't
joined an
organization?

Can't find
info about
opportunities?



Engagement in Co-Curricular Opportunities leads to increased...



Top statistics tying engagement in co-curricular opportunities with increased retention, persistence, GPA, sense of belonging, workforce-readiness and more

Retention & Persistence



- Students who were part of a student organization were 58% less likely to stop out of a public university after their first semester and 24% less likely to drop out after their second or third semester than students not part of a student organization.

^ Source: Longitudinal Influence of Behavioral Health, Emotional Health, and Student Involvement on College Student Retention, **Journal of College Student Development**

Sense of Belonging

Compared to undergraduate students who are not involved, Ohio State undergrads who are highly involved with campus activities are:

2.6
times

More likely to feel they are part of the Ohio State community

2.4
times

More likely to participate in Ohio State traditions

1.9
times

More likely to be satisfied with their experiences at Ohio State

^ Source: Involvement and Belonging, [Center for the Study of Student Life at The Ohio State University](#)



Hartford Community College students who attend campus co-curricular events are **53.7% more likely** to persist through to the next academic year than their non-engaged peers.

Invaluable data discovered through Modern Campus Involve



First-year Arkansas Tech University students who record **at least one hour of community or volunteer service have a 94% retention rate** – 22% points more than their peers who didn't record any community or volunteer service hours.

Invaluable data discovered through Modern Campus Involve



Valdosta State University who attend at least 10 events per semester **are 13 percentage points more likely** to persist through to the next semester.

Invaluable data discovered through Modern Campus Involve

High Leverage Texting



Timely



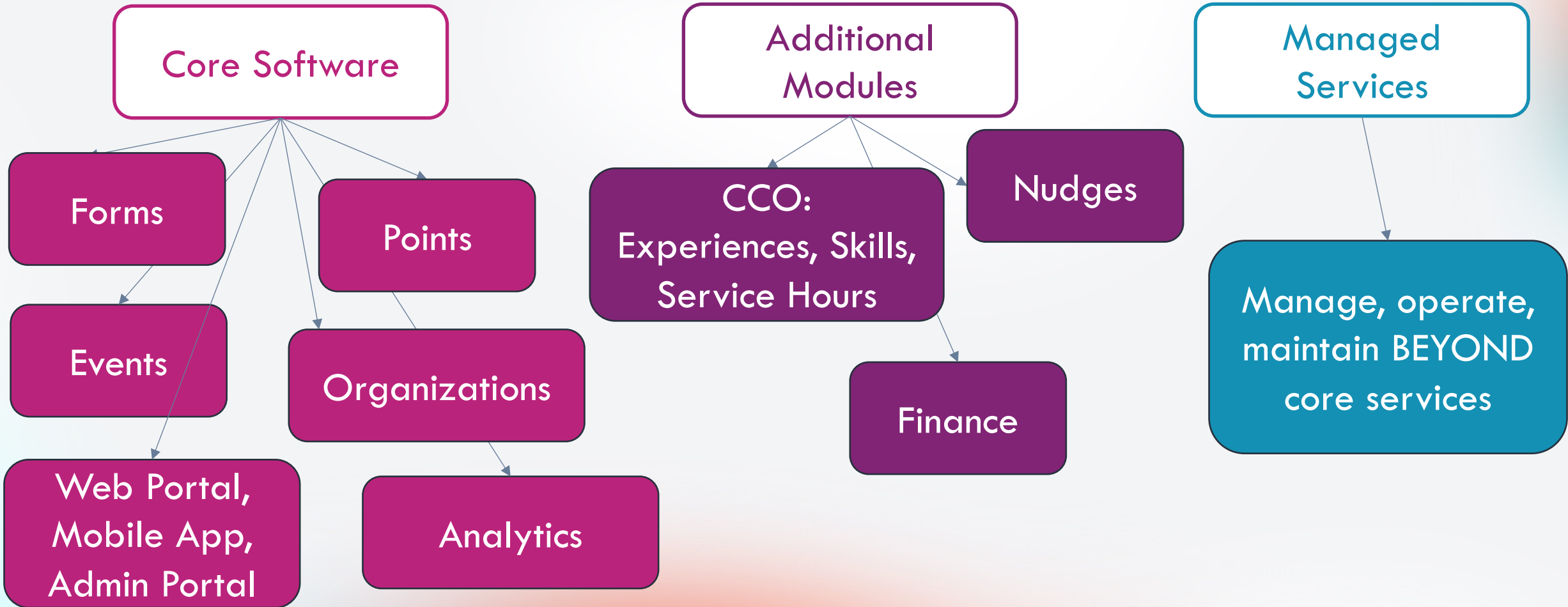
High Open Rate



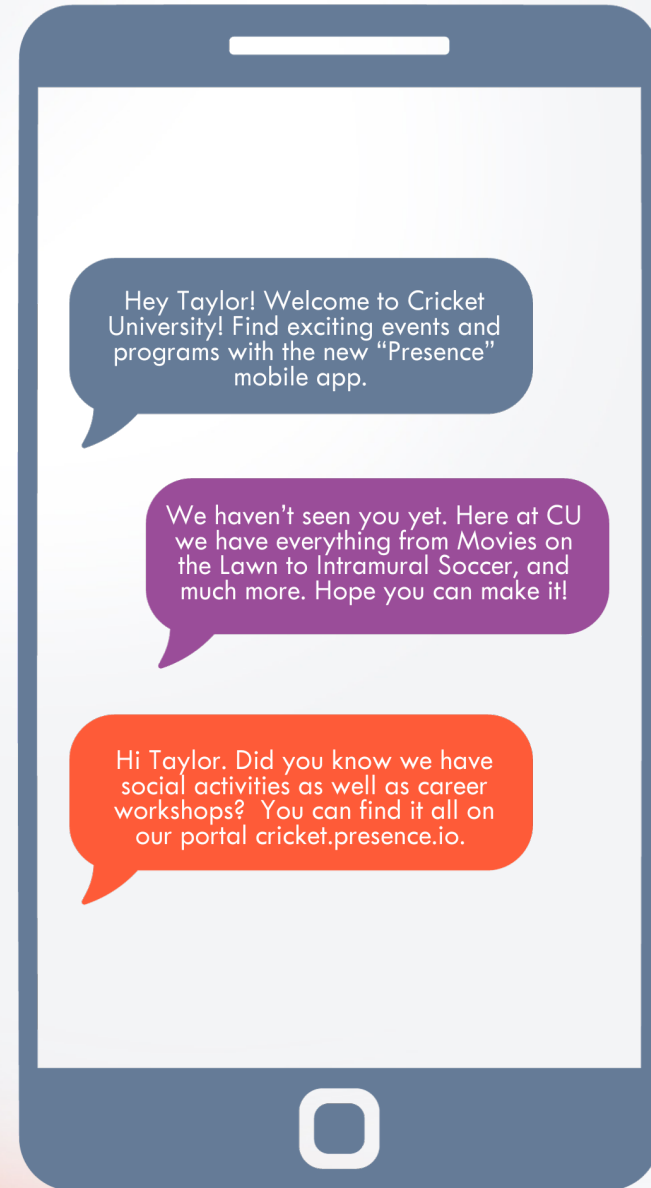
Concise

Nudges

Modern Campus Involve



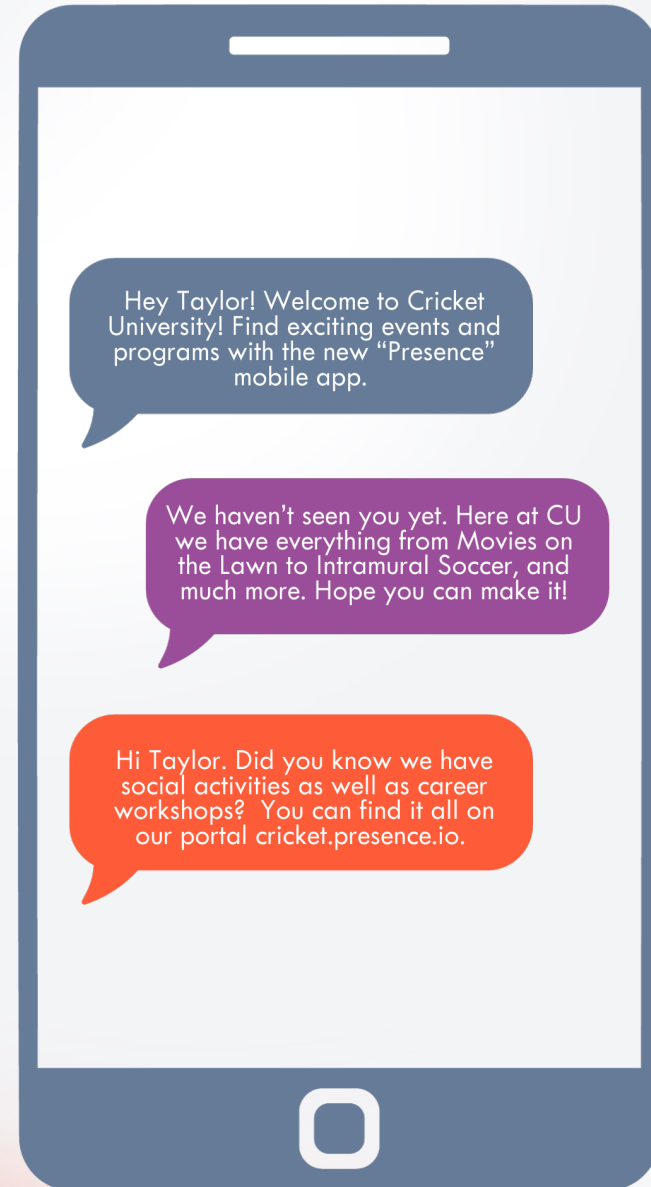
Nudges



What are Involve Nudges?

- Subscription Service
- Series of text messages
- Targeted and specific
- Encourage engagement or re-engagement

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How Nudges Work

Nudge Focus Choices

Featured Organizations

Get involved in student organizations on campus.

See More

CREATE ORGANIZATION



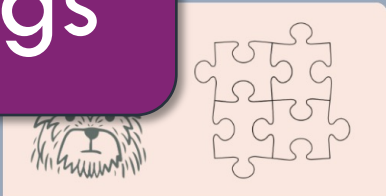
Campus Life



CU Pride Coalition



Francais s'il vous plait?



Puzzlers



CU Office of Health and Well...



Gardening Club

60
Orgs

Happening Now



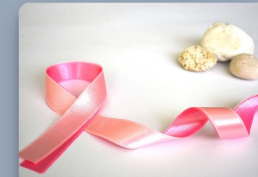
7th Heaven Rewatch-A-Thon
CU Pride Coalition

📅 09/20/2023 - 11:22 AM

📍 Student Union TV and Cuddle Zone

Events

Coming Up



Knitting Hats for Br...

📅 10/13/2024 - 6:30 PM



Career Fair

📅 10/24/2024 - 12:57 PM

Criteria – who gets the text?

- All students
- Have not attended an event in ____ days
- Have never attended an event
- Have not engaged in the first 6 weeks
- Not a member of any organizations
- Member of less than ____ organizations
- Officer in an organization



Examples

Angela hasn't attended event yet this semester.



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🔥 Looking for something fun to do after class? Check out the campus events going on this week! There's something for everyone. Bring your crew or meet some new people—either way, we'd love to see you there! 😎🎉 Find events and programs on the Modern Campus Involve mobile app.

Angela, we haven't seen you at any events yet. Don't let the best part of college pass you by—campus events are where the fun happens! ✨ Whether it's music, free food, or just hanging out, these events are made for YOU. Get out there and make the most of it—you won't regret it! 🎉😄



Angela attends a student union movie night.

Angela no longer meets criteria and will not get follow up Nudges!