ASI 2021 – 2022 Funding Workshop Course

Upcoming Topics

1. Introduction to ASI Funding
2. Eligibility for Clubs/Organizations, Events, and Purchasable items
3. Funding Request Packet – Parts and Procedure
4. Deadlines and presenting at the Funding and Finance Meetings
5. Request for Payment and Processing Packet – Parts and Procedure
6. Final information and helpful resources
7. Review Quiz

1: Introduction to ODC ASI Funding Workshop

Presentation Agenda

1. Introduction to ASI Funding
2. Eligibility for Clubs/Organizations, Events, and Purchasable items
3. Funding Request Packet – Parts and Procedure
4. Deadlines and presenting at the Funding and Finance Meetings
5. Request for Payment and Processing Packet – Parts and Procedure
6. Final information and helpful resources
7. Review Quiz

General Information about ASI

- Associated Students Incorporated, Cal State LA Student Government
- Vision Statement:

Ignite Potential & Empower Student Voices For the students, by the students.

- Programming, Advocacy, and University Support
- Website: https://asicalstatela.org/
- Funding Page: https://asicalstatela.org/services/clubs-and-organizations-funding

Vision for Club and Organization Funding:

ASI funds events hosted by recognized campus clubs and organizations in order to plan and host diverse and engaging events to increase Cal State LA campus involvement and community.

2: Eligibility for Clubs/Organizations, Events, and Purchasable items

Club/Organizations Eligibility

- Recognized and in good standing with the University
- President and Treasurer completed the Funding Workshop Course
- Eligible for up to $3,000 per semester based on a first come first serve basis of ASI available funds

Event Eligibility

- Approved Event Registration Form from CSI on Presence
- Open to all Cal State LA Students
- Compliant with American with Disabilities Act (ADA)
- Only funds Fall and Spring events based on the academic calendar

presence

Purchase Eligibility

- Dictated by Direct Funding Guidelines
- Clothing must be sweatshop free determined by a sweatshop free list or email confirmation from company
- Must be approved prior to purchase by ASI at the Finance/Funding Meetings
- Not applicable to “Do Not Fund” List in ASI Policy 204

Direct Funding Guidelines and Policy 204

- Lists what ASI can or can not fund
- Direct Funding Guidelines can be found at: https://asicalstatela.org/sites/default/files/content/upload/2019/08/direct-funding-guidelines-10.18.18.pdf
- Policy 204 can be found at: https://asicalstatela.org/sites/default/files/content/upload/2019/01/policy-204-finance-funding-guidelines-amended-10.18.18.pdf
- Limits on hospitality, marketing, honorarium, equipment, and others

Purchases Eligibility

Summarized - ASI will not Fund policy:				
Office supplies	Conference/ Seminar fees*	Scholarships or scholarship donations	Non-advertised programming during general meetings	Off campus events for recreation/leisure
Telephone expenses	Recruitment of Cal State LA students	Programs non-ADA compliant	Salaries, fees, honorariums for Cal State LA faculty	Race or gender specific award ceremonies or programs
Athletic equipment	Programs that target/benefit Cal State LA students	Events not open to all Cal State LA students	Program equipment over $300 without 3 other estimates	High risk/liability events considered by ASI
Membership fees	Off campus events without University supervision			

*subject to Finance/Funding committee approval

Insurance and Liability

- Clubs may also need to show evidence of adequate insurance coverage furnished by a certificate of insurance that includes the organization, the University, and ASI as additional insured
- ASI is not liable for any insurance for the event

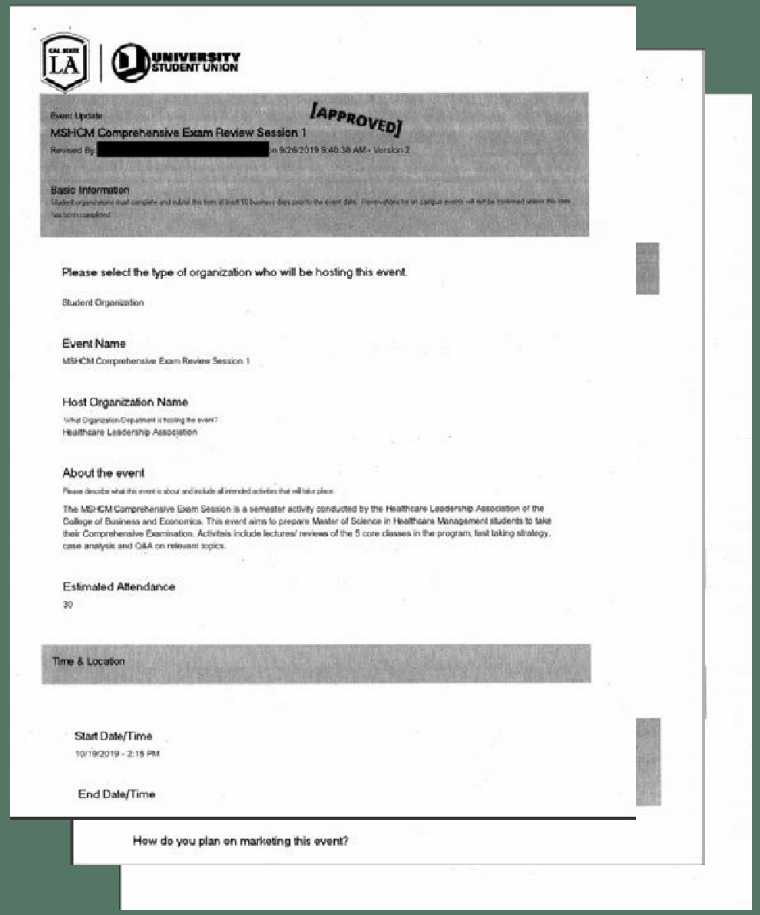
3: Funding Request Packet – Parts and Procedure

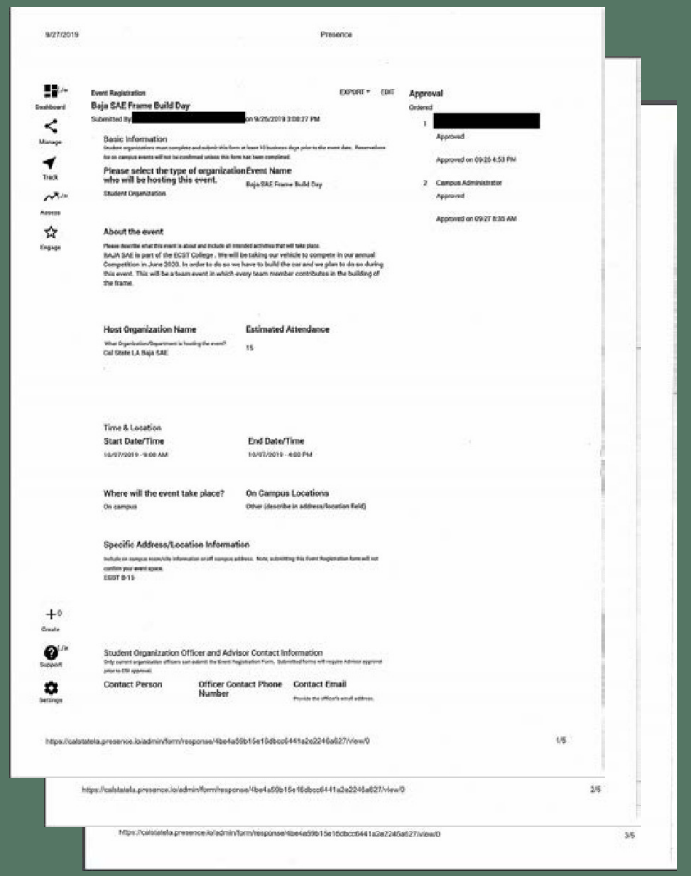
Funding Request Packet – Parts

- A completed/approved CSI Event Registration Form from Presence
- Funding Request Form
  - All information must be typed (no handwritten submissions)
- Event flier sample containing ASI logo and disclosure
- Cost estimates and relevant invoices (not paid) for the event
- (extra) Food Permit for clubs/organizations serving food
  - Food handling permit
- (extra) Banquet Event Order (BEO) Form for clubs/organizations requesting UAS Catering
- (extra) Designs for purchases with ASI logo
- (extra) Cosponsor Agreement Form for multiple clubs/organizations hosting a single event

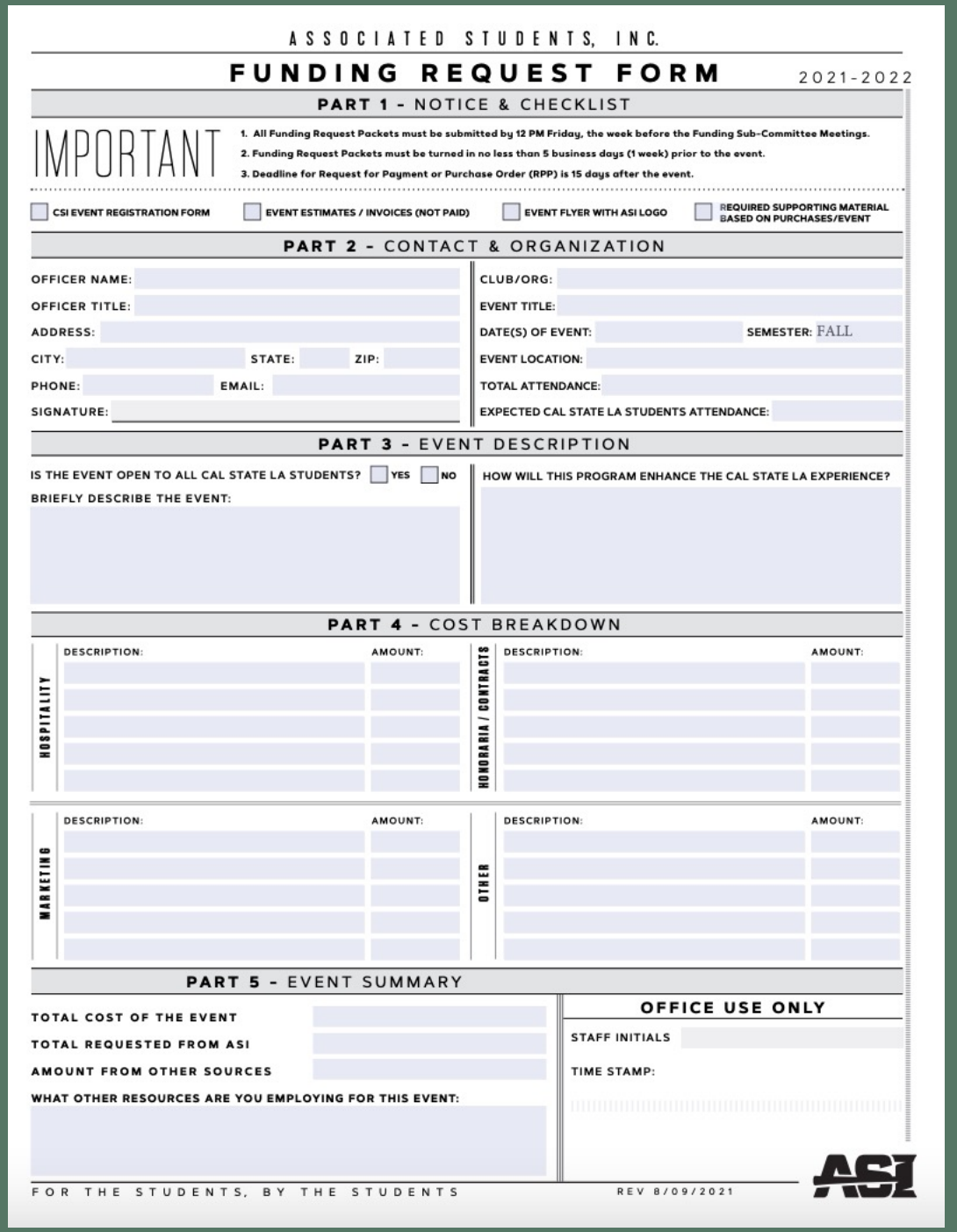
Approved CSI Presence Event Registration Form

- All pages of the CSI Presence Event Registration form
- Event details will be checked against information supplied in ASI paperwork.





ASI Funding Request Form



ASSOCIATED STUDENTS, INC.

FUNDING REQUEST FORM 2021-2022

PART 1 - NOTICE & CHECKLIST

IMPORTANT

1. All Funding Request Packets must be submitted by 12 PM Friday, the week before the Funding Sub-Committee Meetings.
2. Funding Request Packets must be turned in no less than 5 business days (1 week) prior to the event.
3. Deadline for Request for Payment or Purchase Order (RPP) is 15 days after the event.

☐ CSI EVENT REGISTRATION FORM ☐ EVENT ESTIMATES / INVOICES (NOT PAID) ☐ EVENT FLYER WITH ASI LOGO ☐ REQUIRED SUPPORTING MATERIAL BASED ON PURCHASES/EVENT

PART 2 - CONTACT & ORGANIZATION

OFFICER NAME:
OFFICER TITLE:
ADDRESS:
CITY: STATE: ZIP:
PHONE: EMAIL:
SIGNATURE:

CLUB/ORG:
EVENT TITLE:
DATE(S) OF EVENT: SEMESTER: FALL
EVENT LOCATION:
TOTAL ATTENDANCE:
EXPECTED CAL STATE LA STUDENTS ATTENDANCE:

PART 3 - EVENT DESCRIPTION

IS THE EVENT OPEN TO ALL CAL STATE LA STUDENTS? ☐ YES ☐ NO

BRIEFLY DESCRIBE THE EVENT:

HOW WILL THIS PROGRAM ENHANCE THE CAL STATE LA EXPERIENCE?

PART 4 - COST BREAKDOWN

HOSPITALITY

DESCRIPTION:	AMOUNT:

HONORARIA / CONTRACTS

DESCRIPTION:	AMOUNT:

MARKETING

DESCRIPTION:	AMOUNT:

OTHER

DESCRIPTION:	AMOUNT:

PART 5 - EVENT SUMMARY

TOTAL COST OF THE EVENT
TOTAL REQUESTED FROM ASI
AMOUNT FROM OTHER SOURCES
WHAT OTHER RESOURCES ARE YOU EMPLOYING FOR THIS EVENT:

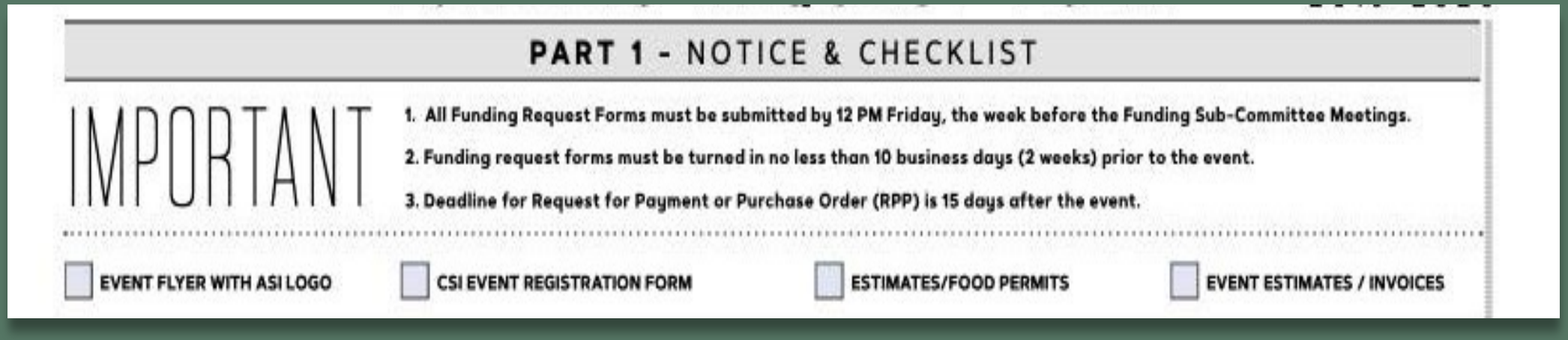
OFFICE USE ONLY

STAFF INITIALS
TIME STAMP:

FOR THE STUDENTS, BY THE STUDENTS REV 8/09/2021

Part 1 – Notice and Checklist

- General Information.
- Can be used when completed.



PART 1 - NOTICE & CHECKLIST

IMPORTANT

1. All Funding Request Forms must be submitted by 12 PM Friday, the week before the Funding Sub-Committee Meetings.
2. Funding request forms must be turned in no less than 10 business days (2 weeks) prior to the event.
3. Deadline for Request for Payment or Purchase Order (RPP) is 15 days after the event.

☐ EVENT FLYER WITH ASI LOGO ☐ CSI EVENT REGISTRATION FORM ☐ ESTIMATES/FOOD PERMITS ☐ EVENT ESTIMATES / INVOICES

Part 2 – Contact and Organization

- Must be filled out and signed by a club officer.
- Make sure the given contact information is regularly checked (Cal State LA emails only).
- Event information must match with CSI Presence Event Registration Form information.
- For expected attendance, use whole number estimates (not 30-50, 50+).

PART 2 - CONTACT & ORGANIZATION

OFFICER NAME:
TITLE:
ADDRESS:
CITY: STATE: ZIP:
PHONE: EMAIL:
SIGNATURE:

CLUB/ORG:
EVENT TITLE:
DATE(S) OF EVENT: SEMESTER: FALL
EVENT LOCATION:
EXPECTED ATTENDANCE:
EXPECTED CAL STATE LA STUDENTS ATTENDANCE:

Part 3 – Event Description

- All events must be open to all Cal State LA Students to qualify for ASI Funding.
- Fill in the information as requested.

PART 3 - EVENT DESCRIPTION

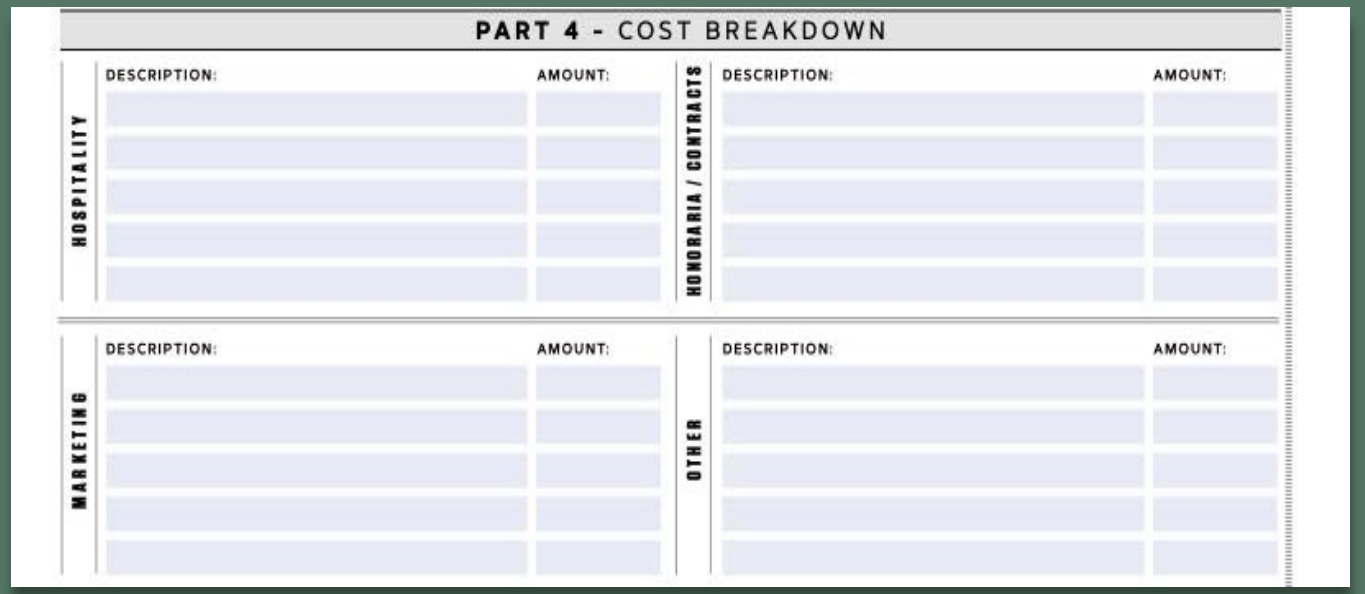
IS THE EVENT OPEN TO ALL CAL STATE LA STUDENTS? ☐ YES ☐ NO

BRIEFLY DESCRIBE THE EVENT:

HOW WILL THIS PROGRAM ENHANCE THE CAL STATE LA EXPERIENCE?

Part 4 – Cost Breakdown

- Fill in the table with all events expenses with their cost and a description.
- Better to have a general description than a specific one.
- If more space is needed, attach an additional spreadsheet detailing costs.



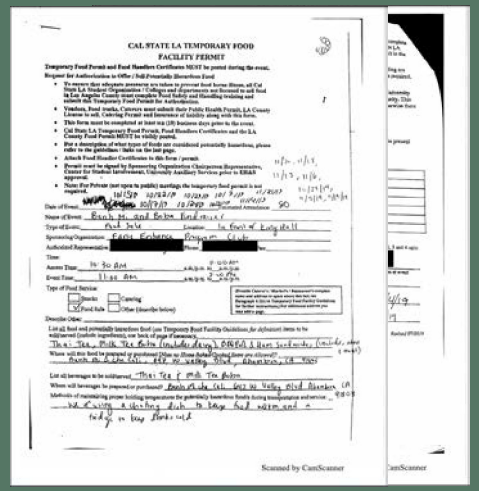
PART 4 - COST BREAKDOWN

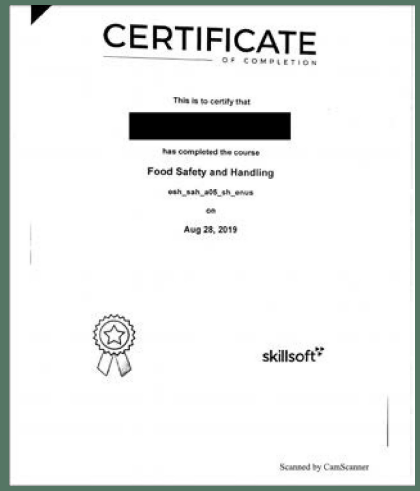
HOSPITALITY	DESCRIPTION:	AMOUNT:	HONORARIA / CONTRACTS	DESCRIPTION:	AMOUNT:

MARKETING	DESCRIPTION:	AMOUNT:	OTHER	DESCRIPTION:	AMOUNT:

Cost Breakdown - Hospitality

- Food and drinks bought for Fundraisers and Events
  - Requires a Food Permit to be filled out through Health and Safety with Health Course certificates (http://www.calstatela.edu/sites/default/files/groups/Environmental%20Health%20and%20Safety/temporaryfoodpermit.pdf).
- Events Catered by Golden Eagle Hospitality
  - Requires a Banquet Event Order (BEO) Form instead of a food permit (http://www.calstatela.edu/dining-on-campus)
- For events where funds are collected, only 50% of the requested amount can be funded.





Cost Breakdown – Honoraria and Contracts

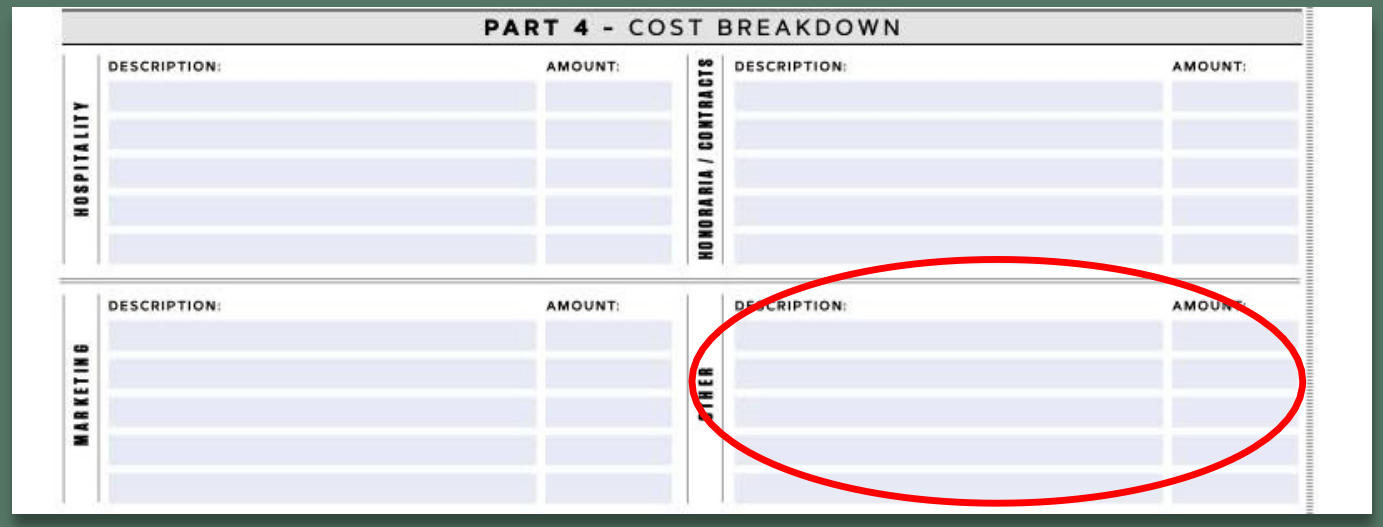
- Payments or Gifts for Guests attending an event. Limits Depended on who it is intended for.
  - Speaker(s)/Guest(s) outside of Cal State LA (for services, gifts, awards), up to $710. Emails regarding costs will serve as an invoice.
  - Cal State LA students (for gifts, trophies, prizes that comply with CSI policy) up to $560.
  - Cal State LA faculty fees can not be funded by ASI.
- Designs (for awards, trophies, gifts) must have the ASI logo, and a sample design must be in the funding packet.

Cost Breakdown – Marketing

- All designs for Marketing items must have an ASI Logo and be provided in the funding packet.
- Club Shirts
  - Club must prove that clothing was produced by sweatshop free companies or select from a predetermined sweatshop free list.
  - Max $7.85 per t-shirt/polo, $14.30 per sweater, and 50% of embroidery cost.
- Printing Fliers
  - Funding limit is determined by paper size and color or B&W.
- Other
  - ASI will fund a max of 70% of the total cost, 50% if marketing material is being sold.

Cost Breakdown – Other

- Costs that fall outside of the prior three categories.
- Supply as much supporting documentation and information so that ASI can adequately sort expenses.

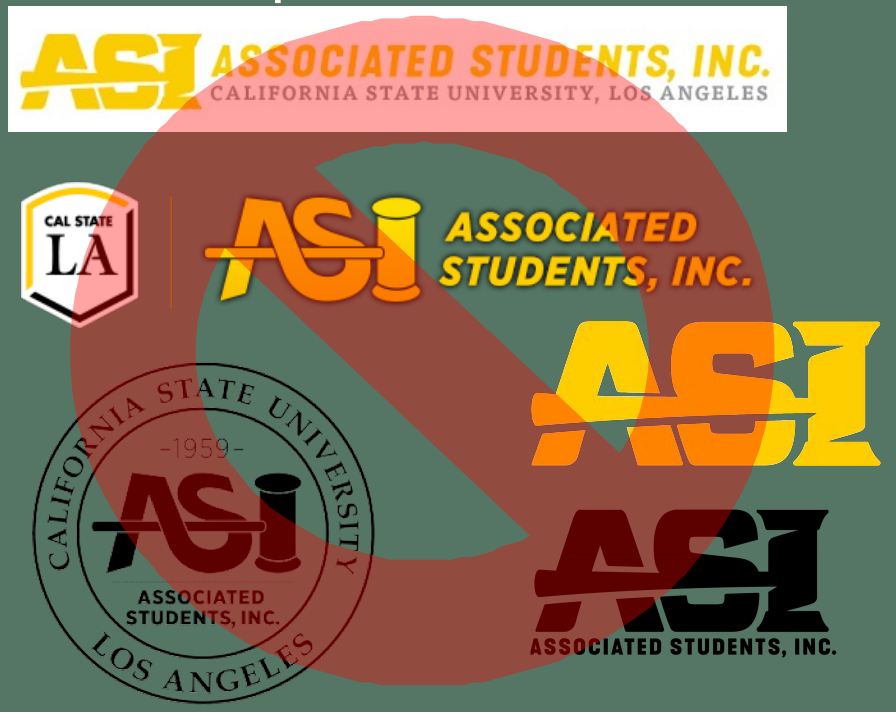


Event Flier with Visible ASI Logo

Acceptable:

How Prevent Cutoff:

Not acceptable:



Finding and Using Examples

- Past Funding Sub-committee meetings on the ASI website
- Ideas of events that could be funded and submitted paperwork for said event

Some examples:

- https://asicalstatela.org/sites/default/files/content/attachments/2021/03/phi-alpha-theta-eta-xi-32321redacted.pdf
- https://asicalstatela.org/sites/default/files/content/attachments/2021/02/pihra-31221redacted.pdf

4: Deadlines and presenting at the Funding and Finance Meetings

Funding Request Packet Submission

- Email all relevant files to: asivcf@calstatela.edu, asivpf@calstatela.edu, asiomaa@calstatela.edu, and dflorez3@calstatela.edu
  - Email send date/time will serve as the timestamp
- Deadline for submissions is the Friday 12pm before the intended Funding Meeting
- ASI staff will get back to the club/organization representative submissions no later than Monday morning to corrected any errors
- Any paperwork not finalized or completed before Monday 12pm will not be on the agenda for the upcoming Funding Meeting

Deadlines for Presenting at a Meeting

- Events must be after the date of approval
- For Requests under $2,000
  - Must present Funding Request Packet at a Funding Sub-committee meeting before the event date
  - Submit Funding Request Packets by the Friday 12pm before the Funding meeting
  - Present at Funding Meeting the following week
- For Requests $2,000 and over
  - Must present Funding Request Packet at a Funding Sub-Committee meeting and then a Finance Committee Meeting that is before the event date
  - Submit Funding Request Packets by the Friday 12pm before the Funding meeting.
  - Present at Funding Meeting the following week and then the Finance meeting the next following week

Funding Sub-Committee Meeting Dates and Deadlines

Deadline for Meeting	Under $2,000	$2,000 and over
Packet Deadlines @ 12pm	Funding Meetings @ 12pm	Finance Meetings @ 12pm
August 20, 2021	August 27, 2021	September 3, 2021
September 3, 2021	September 10, 2021	September 17, 2021
September 17, 2021	September 24, 2021	October 1, 2021
October 1, 2021	October 8, 2021	October 15, 2021
October 15, 2021	October 22, 2021	October 29, 2021
October 29, 2021	November 5, 2021	November 12, 2021
November 12, 2021	November 19, 2021	December 3, 2021
December 3, 2021	December 10, 2021	

Deadline Examples

- Requesting $1,500 for an event on November 8, funding request packet would need to be turned in by October 29th.
- Requesting $2,100 for an event on November 8, funding request packet would need to be turned in by October 15th.

Preparation and Expectations for Meeting

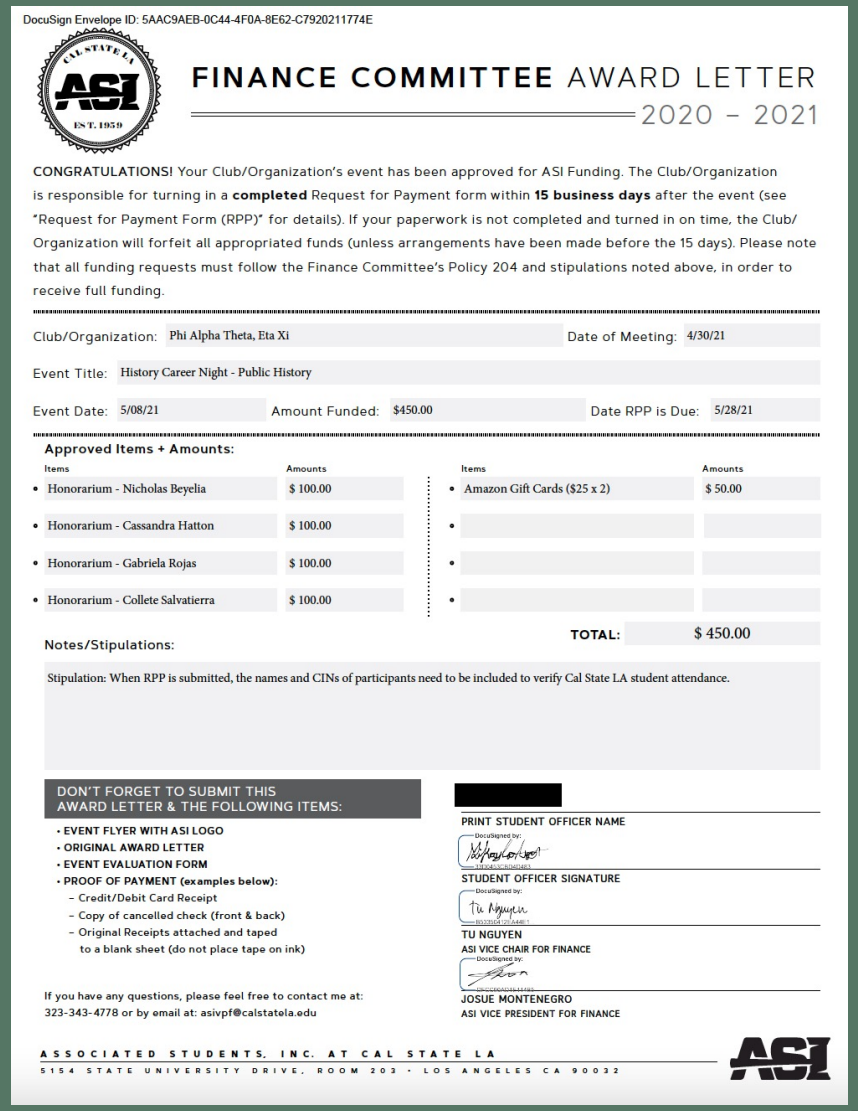
- Funding Sub-Committee and Finance Committee meetings are held Friday 12pm weekly, alternating
- The earlier you submit forms means earlier on agenda
- Review meeting agenda posted on the ASI website to confirm your club's spot on the agenda. Agenda is posted Tuesday 12 pm the week of the meeting. Email as soon as possible if there is an error.

Preparation and Expectations for Meeting

- Representative must be knowledgeable about event and be prepared to answer questions about event for planning and logistics
- Representative may be required to supply any missing material as a stipulation for approval after or during the meeting.
- Email asivcf@calstatela.edu if there are any scheduling conflicts.

After the Meeting – Award Letter

- Summary of approved expenditures for the event from the Finance/Funding meeting.
- Sent out within a week of the Finance/Funding meeting presented at
- Needs signature from club/organization President or Treasurer
- Submitted with Request for Payment Processing (RPP) and used as a reference for what purchases ASI will be able to reimburse



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FINANCE COMMITTEE AWARD LETTER
2020 – 2021

CONGRATULATIONS! Your Club/Organization's event has been approved for ASI Funding. The Club/Organization is responsible for turning in a **completed** Request for Payment form within **15 business days** after the event (see "Request for Payment Form (RPP)" for details). If your paperwork is not completed and turned in on time, the Club/Organization will forfeit all appropriated funds (unless arrangements have been made before the 15 days). Please note that all funding requests must follow the Finance Committee's Policy 204 and stipulations noted above, in order to receive full funding.

Club/Organization: Phi Alpha Theta, Eta Xi — Date of Meeting: 4/30/21

Event Title: History Career Night - Public History

Event Date: 5/08/21 — Amount Funded: $450.00 — Date RPP is Due: 5/28/21

Approved Items + Amounts:

Items	Amounts	Items	Amounts
Honorarium - Nicholas Beyelia	$ 100.00	Amazon Gift Cards ($25 x 2)	$ 50.00
Honorarium - Cassandra Hatton	$ 100.00		
Honorarium - Gabriela Rojas	$ 100.00		
Honorarium - Collete Salvatierra	$ 100.00		

TOTAL: $ 450.00

Notes/Stipulations:

Stipulation: When RPP is submitted, the names and CINs of participants need to be included to verify Cal State LA student attendance.

DON'T FORGET TO SUBMIT THIS AWARD LETTER & THE FOLLOWING ITEMS:

- **EVENT FLYER WITH ASI LOGO**
- **ORIGINAL AWARD LETTER**
- **EVENT EVALUATION FORM**
- **PROOF OF PAYMENT (examples below):**
  - Credit/Debit Card Receipt
  - Copy of cancelled check (front & back)
  - Original Receipts attached and taped to a blank sheet (do not place tape on ink)

If you have any questions, please feel free to contact me at:
323-343-4778 or by email at: asivpf@calstatela.edu

[redacted]
PRINT STUDENT OFFICER NAME
STUDENT OFFICER SIGNATURE
TU NGUYEN
ASI VICE CHAIR FOR FINANCE
JOSUE MONTENEGRO
ASI VICE PRESIDENT FOR FINANCE

ASSOCIATED STUDENTS, INC. AT CAL STATE LA
5154 STATE UNIVERSITY DRIVE, ROOM 203 · LOS ANGELES CA 90032

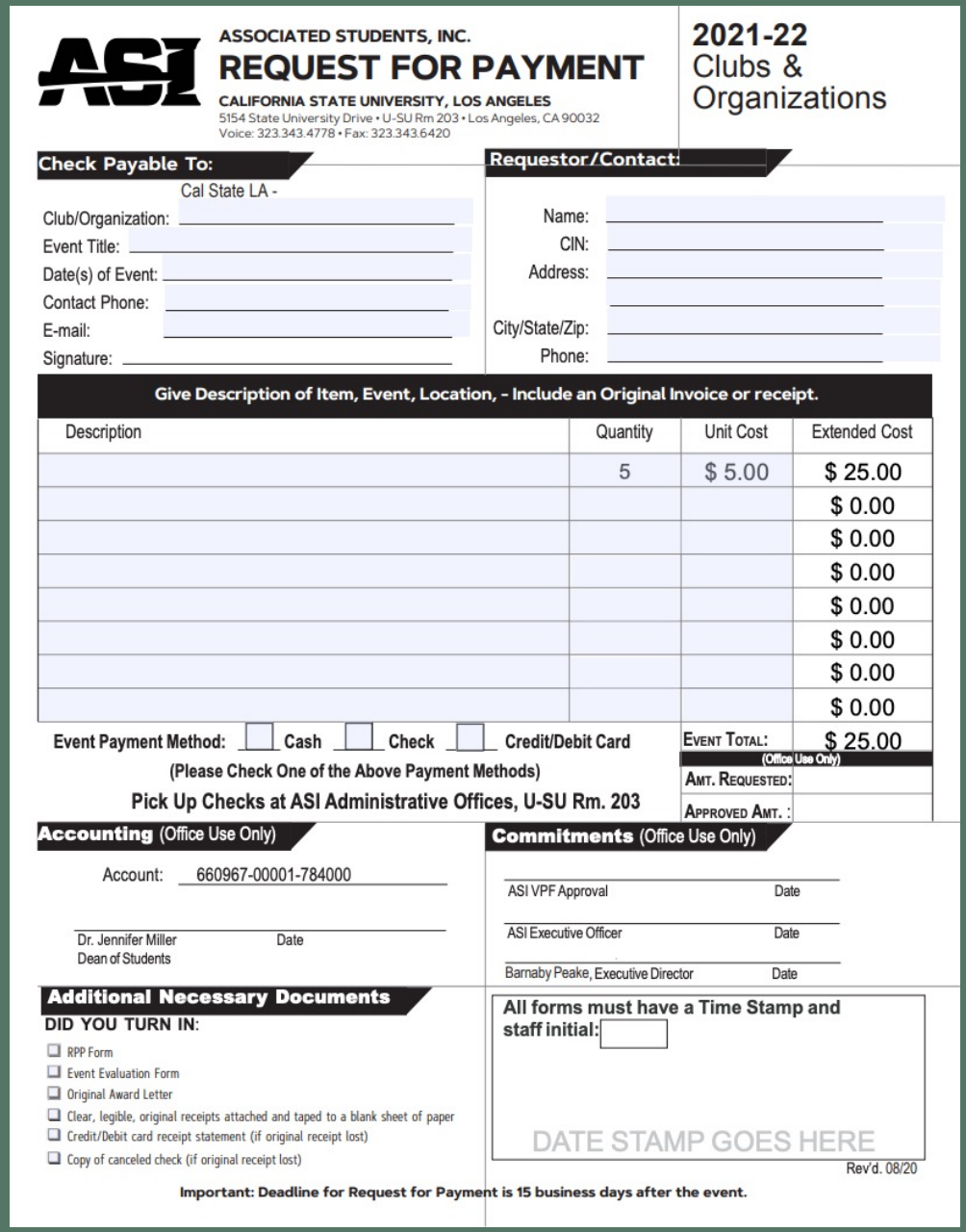
5: Request for Payment and Processing (RPP) Packet – Parts and Procedure

RPP Packet – Parts

- RPP Form
- Event Evaluation Form
- Award Letter
- Sample Flier w/ ASI Logo
- Clear, Scanned-in Original itemized receipt

RPP Form

- Make sure contact information is regularly checked. Must be a Cal State LA email
- Must be typed
- If more room is required, attach an additional spreadsheet.



ASSOCIATED STUDENTS, INC.

REQUEST FOR PAYMENT

CALIFORNIA STATE UNIVERSITY, LOS ANGELES
5154 State University Drive • U-SU Rm 203 • Los Angeles, CA 90032
Voice: 323.343.4778 • Fax: 323.343.6420

2021-22 Clubs & Organizations

Check Payable To: Cal State LA -

Club/Organization: _____
Event Title: _____
Date(s) of Event: _____
Contact Phone: _____
E-mail: _____
Signature: _____

Requestor/Contact:

Name: _____
CIN: _____
Address: _____
City/State/Zip: _____
Phone: _____

Give Description of Item, Event, Location, - Include an Original Invoice or receipt.

Description	Quantity	Unit Cost	Extended Cost
	5	$ 5.00	$ 25.00
			$ 0.00
			$ 0.00
			$ 0.00
			$ 0.00
			$ 0.00
			$ 0.00
			$ 0.00

Event Payment Method: ☐ Cash ☐ Check ☐ Credit/Debit Card
(Please Check One of the Above Payment Methods)
Pick Up Checks at ASI Administrative Offices, U-SU Rm. 203

EVENT TOTAL: $ 25.00

(Office Use Only)
AMT. REQUESTED:
APPROVED AMT. :

Accounting (Office Use Only)

Account: 660967-00001-784000

Dr. Jennifer Miller, Dean of Students — Date

Commitments (Office Use Only)

ASI VPF Approval — Date
ASI Executive Officer — Date
Barnaby Peake, Executive Director — Date

Additional Necessary Documents

DID YOU TURN IN:

- ☐ RPP Form
- ☐ Event Evaluation Form
- ☐ Original Award Letter
- ☐ Clear, legible, original receipts attached and taped to a blank sheet of paper
- ☐ Credit/Debit card receipt statement (if original receipt lost)
- ☐ Copy of canceled check (if original receipt lost)

All forms must have a Time Stamp and staff initial: ☐

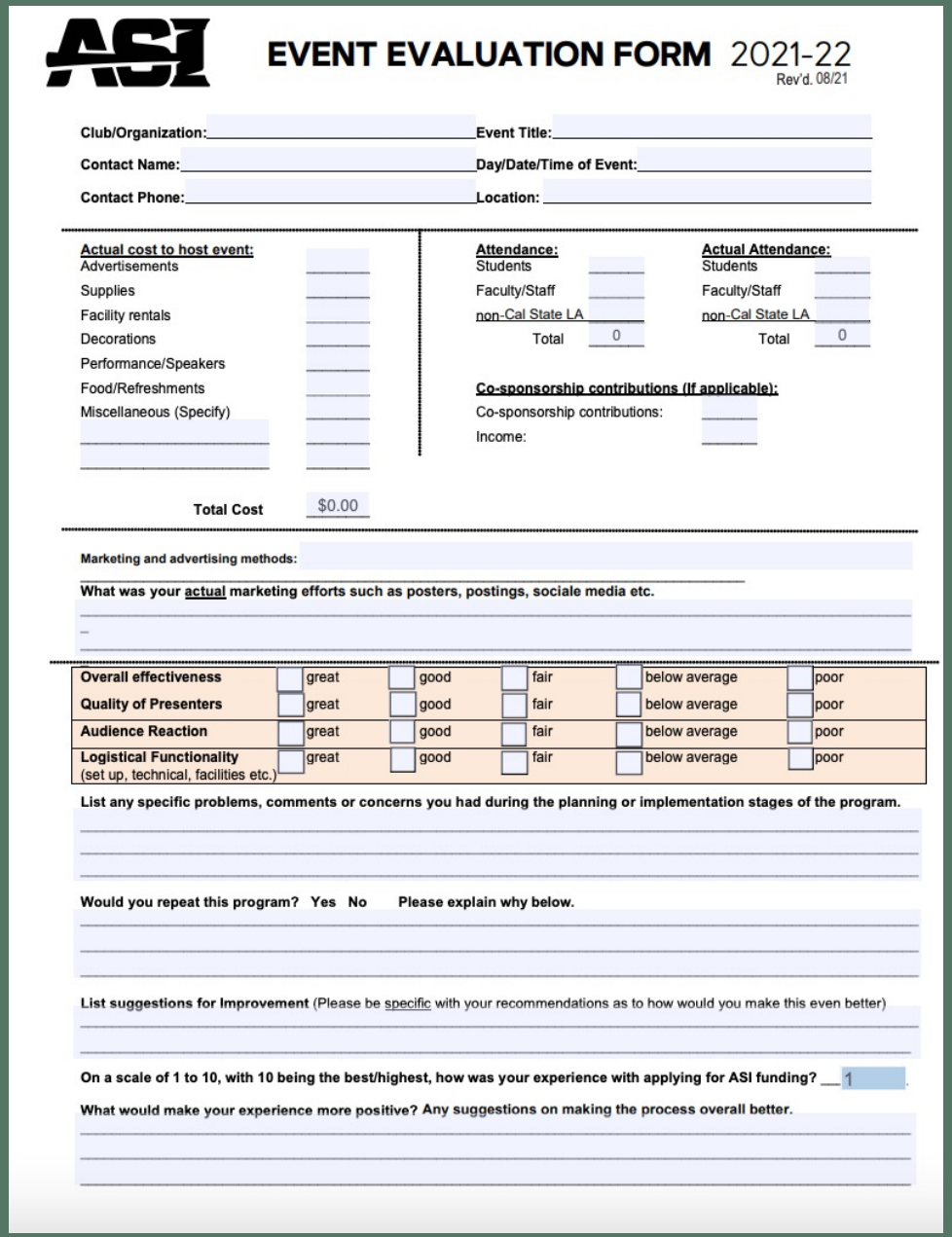
DATE STAMP GOES HERE

Rev'd. 08/20

Important: Deadline for Request for Payment is 15 business days after the event.

Event Evaluation Form

- Must be completely filled in. Requires detailed answers for all questions.



EVENT EVALUATION FORM 2021-22
Rev'd. 08/21

Club/Organization: _____ **Event Title:** _____

Contact Name: _____ **Day/Date/Time of Event:** _____

Contact Phone: _____ **Location:** _____

Actual cost to host event:

Advertisements	
Supplies	
Facility rentals	
Decorations	
Performance/Speakers	
Food/Refreshments	
Miscellaneous (Specify)	
Total Cost	$0.00

Attendance:

Students	
Faculty/Staff	
non-Cal State LA	
Total	0

Actual Attendance:

Students	
Faculty/Staff	
non-Cal State LA	
Total	0

Co-sponsorship contributions (If applicable):

Co-sponsorship contributions:

Income:

Marketing and advertising methods:

What was your actual marketing efforts such as posters, postings, sociale media etc.

Overall effectiveness	great	good	fair	below average	poor
Quality of Presenters	great	good	fair	below average	poor
Audience Reaction	great	good	fair	below average	poor
Logistical Functionality (set up, technical, facilities etc.)	great	good	fair	below average	poor

List any specific problems, comments or concerns you had during the planning or implementation stages of the program.

Would you repeat this program? Yes No Please explain why below.

List suggestions for Improvement (Please be specific with your recommendations as to how would you make this even better)

On a scale of 1 to 10, with 10 being the best/highest, how was your experience with applying for ASI funding? 1

What would make your experience more positive? Any suggestions on making the process overall better.

Receipts

- Original Receipts (Clearly Scanned in)
  - Taped on all four sides on a piece of paper. One receipt per page. Do not cover any ink or text.
  - Manual receipt has PAID stamp and is itemized
  - Receipts must show how items were paid (cash or show last 4 digits of cc)
  - Online orders must have an email confirmation of purchase summary
- If you don't have original receipts, you must do one of the following:
  - Credit Card → Credit card transaction detailing exact charges
  - Bank Card → Debit/ATM statement → Bank Statement
  - Check → Copy of canceled check (front/back)
  - For credit card or bank purchases, you may cover other sensitive information not pertaining to the reimbursement.

Receiving Reimbursement/Check

- For clubs/organizations with a USU bank account
  - We will deposit the check into your USU bank account on your behalf with your approval
- For clubs/organizations with an exempt account
  - We will mail it to the representative requesting approval

**Check can take 1-3 weeks

RPP Packet Submission

- Email all relevant files to: asivcf@calstatela.edu, asivpf@calstatela.edu, asiomaa@calstatela.edu, and dflorez3@calstatela.edu
  - Email send date/time will serve as the timestamp
- Deadline is 15 business days after the event date

6: Final information and helpful resources

Links to More Information

- General Club Funding Information
  - https://asicalstatela.org/services/clubs-and-organizations-funding
- In-depth Policy Information
  - https://asicalstatela.org/student-government/bylaws-operating-procedures/administrative-manual-governing-documents/finance
  - Policy 204 – Funding Policy
  - Direct Funding Guidelines
- ASI Logos for Fliers and Designs
  - https://asicalstatela.org/about-us/asi-studio-47/asi-brand/student-club-organizations-logos
- Funding Sub-Committee Page
  - https://asicalstatela.org/committee/asi-funding-sub-committee
- Funding Request Form
  - https://asicalstatela.org/sites/default/files/content/upload/2021/08/21-22-funding-request-form.pdf
- RPP and Event Evaluation Forms
  - https://asicalstatela.org/sites/default/files/content/upload/2021/08/asi-2021-22-funding-request-payment.pdf

Joining Finance Committee/Funding Sub-Committees

- Finance: Learn where student fees are allocated and provide input on allocations
- Funding: Learn about the Funding process for your club/organization and provide input on how to better serve students
- $25 incentive per meeting attended
- Policy writing, Resume, and Networking opportunities
- Apply: https://asicalstatela.org/get-involved

7: Review Quiz

Review Quiz

- Link: https://forms.gle/co9CqSX8YjgWYHKj9
- President/Treasurer must get ≥70% to pass and receive credit for attending
- Maximum of 3 attempts
- If can not pass after 3 attempts, ASI Vice Chair for Finance will request to meet to review confusing information