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

ASI

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

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

ASI

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

ASI

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

ASI

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 <u>must be typed</u> (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

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:		CLUB/ORG:
TITLE:		EVENT TITLE:
ADDRESS:		DATE(S) OF EVENT:	SEMESTER: FALL
CITY:	STATE:	ZIP:	EVENT LOCATION:
PHONE:	EMAIL:	EXPECTED ATTENDANCE:
SIGNATURE:		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.

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) <u>must have the ASI logo</u>, and a sample design must be in the funding packet.

23

Cost Breakdown – Marketing

- All designs for Marketing items <u>must have an ASI Logo</u> and be provided in the funding packet.

- Club Shirts
  - Club must prove that clothing was produced by sweatshop free companies or select from a <u>predetermined sweatshop free list</u>.
  - 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:

Not acceptable:

How Prevent Cutoff:
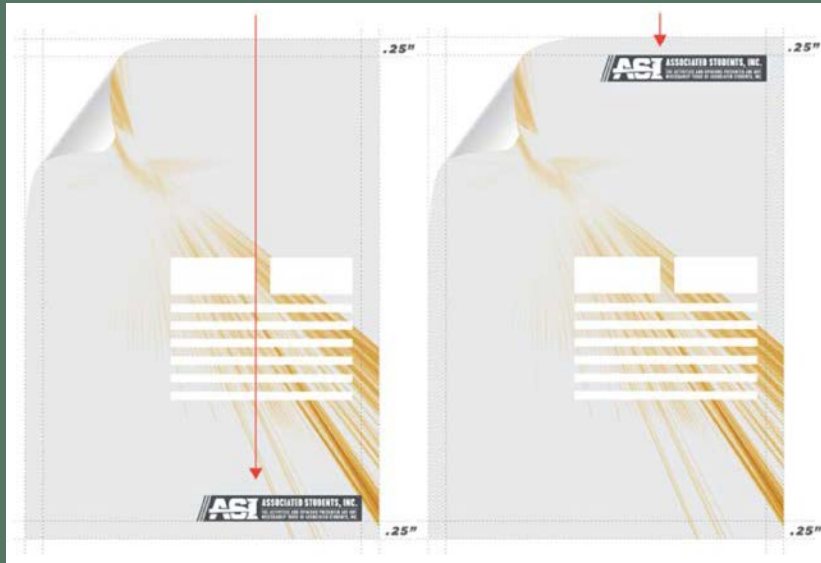
Finding and Using Examples

- 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

ASI

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

ASI

Deadlines for Presenting at a Meeting

- Events <u>must</u> be after the date of approval
- For Requests under $2,000
  - Must present Funding Request Packet at a Funding Sub-committee meeting <u>before</u> 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 <u>and then</u> 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 <u>and then</u> the Finance meeting the next following week

ASI

Funding Sub-Committee Meeting Dates and Deadlines

Deadline for Meeting
Packet Deadlines @ 12pm
August 20, 2021
September 3, 2021
September 17, 2021
October 1, 2021
October 15, 2021
October 29, 2021
November 12, 2021
December 3, 2021

Under $2,000
Funding Meetings @ 12pm
August 27, 2021
September 10, 2021
September 24, 2021
October 8, 2021
October 22, 2021
November 5, 2021
November 19, 2021
December 10, 2021

$2,000 and over
Finance Meetings @ 12pm
September 3, 2021
September 17, 2021
October 1, 2021
October 15, 2021
October 29, 2021
November 12, 2021
December 3, 2021

ASI

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.

ASI

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

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.

Event Evaluation Form

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

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

ASI

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

ASI

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