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ASSOCIATED STUDENTS OF CAL STATE LA, INC.

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## Financial Policies

### POLICY 204 - Funding Policy

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#### 1. PURPOSE

To provide guidelines for the allocation and disbursement of student body fees under the direction of ASI that meet the needs of the corporation and the students it serves. The Associated Students of Cal State LA, Incorporated (ASI) shall fund only recognized student organization's programs and services in a manner consistent with State guidelines for the distribution of student body funds. The following stipulations serve as a means of leveraging student body fees to support students and the programs they planned.

#### 2. REFERENCES

[ASI Bylaws](#)  
[ASI Financial Policies](#)  
[ASI Funding Price List](#)  
[California Education Code](#)  
[Cal State LA policies and procedures](#)  
[California State University Policies](#)

#### 3. DEFINITIONS

#### 4. ALLOCATION OF ASI FUNDS

##### 4.1 Authority

- 4.1.1 As stated in the ASI Bylaws (Article VI, Section 5), the Board of Directors shall approve the appropriation of Associated Students, Inc. funds in accordance with Title 5, California Administrative Code, the Education Code and the Corporations Code of the State of California, and applicable policies of the Board of Trustees of the California State University. Implementation of any such provisions, however, is subject to the review and approval of the University President in accordance with Section 42402 of Title 5 California Code of Regulations.
- 4.1.2 ASI Finance Committee has been delegated the authority by the Board of Directors to allocate funding, in accordance with these policies and within the limits of the approved annual budget, with a majority vote of the committee.
- 4.1.3 The ASI Board of Directors reserves the right to review, change, or rescind approved funding allocations made by the Finance Committee.
- 4.1.4 The ASI Executive Director is responsible for the overall management of the ASI budget and in this capacity shall have the right to temporarily freeze the allocation of funds by the Finance Committee to prevent a detrimental financial impact to the corporation. In such situations, the Executive Director shall immediately inform the

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Board of Directors of the rationale for the temporary freeze and articulate a plan to address the problem.

- 4.1.5 The ASI Vice President for Finance and ASI staff shall oversee and track all allocations and disbursements, providing the Finance Committee and the Board of Directors with regular updates.

#### **4.2 Funding Eligibility**

- 4.2.1 ASI shall consider funding requests for student events held during the Fall and Spring semester by recognized student organizations.
- 4.2.2 Funding eligibility shall be restricted to recognized student organizations in good standing with the University. Failure to maintain university recognition may result in rescinding previously allocated funding.
- 4.2.3 Programs, events, and activities must be open and advertised to all Cal State LA students.
- 4.2.4 Insurance Requirements- Recognized student organizations may be required to work with University Risk Management and/or Procurement for contracted services and performers to ensure CSU liability and insurance requirements are met.
- 4.2.5 ASI may consider funding requests from university departments for their sponsored programs on a case-by-case basis (see section 8 below).

#### **4.3 Funding Allocation and Distribution**

- 4.3.1 Procedures to request funding from ASI shall be articulated and posted on the ASI website and advertised to recognized student organizations each semester. Funding requests shall be reviewed and considered by the Finance Committee. Recognized student organizations shall not be required to attend the meeting during which their funding request is considered, but an allocation may not be approved if the Committee has unanswered questions about the proposed event request.
- 4.3.2 Once approved, the requesting recognized student organization will receive an Award Letter from ASI specifying the total amount and the individual expenses that have been approved.
- 4.3.3 Approved funds shall only be issued as a reimbursement for the exact items and amounts stated in the Award Letter. If the recognized student organization uses the funds for anything other than the approved expenses, ASI may not issue the full reimbursement.
  - 4.3.3.1 After the event and upon receiving the Award Letter, the Recognized student organizations may submit a request for reimbursement for the requested expenses.
  - 4.3.3.2 Receipts, paid invoices, and other forms of proof of purchase must be submitted.
  - 4.3.3.3 Recognized student organizations should submit funding requests at least 10 business days prior to the date of the event to provide time for their event planning efforts.
  - 4.3.3.4 ASI may consider allocating funds after an event has occurred in which

case ASI will require proof of all purchases with the submittal of the funding request. Post-event funding requests will only be considered in the semester when they occur. The last day to submit a funding request is the funding submission deadline for the last Finance Committee meeting for the semester.

- 4.3.4 For nationally recognized organizations that have bank accounts off-campus, ASI will issue a reimbursement check that the student officers can deposit in their off-campus RSO account.

#### **4.4 Requirements for Approved Funding Requests**

- 4.4.1 Only pre-approved expenses/activities, as stated in the Award Letter will be reimbursed.
- 4.4.2 Request for reimbursement must be submitted to the ASI Office within 15 business days after the date of the event. If the Request for Payment is not submitted within 15 business days, ASI may revoke the approved funding and reallocate the funds to another recognized student organization. In such a situation, the recognized student organization requesting funds would become solely responsible for all expenses associated with their event. ASI shall not be responsible for unpaid bills or reimbursements.
- 4.4.3 Approved allocations are assigned appropriate expiration dates determined by the ASI Finance Committee and/or ASI Vice President for Finance. Expenditures must be recorded before the expiration date, or those specific event funds may revert to ASI for additional allocations from the "Unallocated Funds" line item. Deadlines are determined in accordance with ASI office operating hours and University holidays.
- 4.4.4 Recognized student organizations receiving funding from ASI shall be required to include the following statement on their marketing materials when listing the sponsors of the program, "Funded by the Associated Students, Inc. The views expressed herein are those of the campus organization and are not necessarily those of the Associated Students, Inc." The ASI logo may also be included on shirts and other merchandise with written approval from the ASI Director for Graphics and Marketing.
- 4.4.5 Events requiring contracted services must be coordinated with the ASI Staff at least 30 days prior to the event. A copy of the fully executed contract must be obtained and included with the request for reimbursement before the payment will be issued.
- 4.4.6 A maximum amount to be funded each semester to recognized student organizations will be established and shall be based on the approved ASI Budget. The ASI Finance Committee shall establish the maximum funding amounts annually and communicate this to recognized student organizations each semester and clearly state this amount in the Funding Price List.

#### **4.5 Funding Price List**

- 4.5.1 ASI shall establish a Funding Price List annually that articulates standardized costs for programming expenses, such as hospitality, food, merchandise, etc. The

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Funding Price List shall be reviewed and approved annually by the Finance Committee and presented to the Board of Directors as an information item.

- 4.5.2 ASI will post the Funding Price List on the ASI website and email it to all Cal State LA recognized student organizations when changes are made.
- 4.5.3 All required documentation as stated in the Funding Price List must be submitted with the request and/or reimbursement paperwork.

#### **4.6 Prohibited Expenses**

- 4.6.1 Alcohol, tobacco, marijuana, firearms, medications, or any controlled substances
- 4.6.2 Office supplies for student organization operations (e.g., paper, pens, clips, rubber bands, etc.) unless specifically used for an event.
- 4.6.3 Utilities costs - Telephone, internet, electricity, etc.
- 4.6.4 An organization's or individual member's local, state, regional, or national membership fees
- 4.6.5 Expenses associated with the membership recruitment of non-Cal State LA students
- 4.6.6 Programs for the benefit of, or targeted to, non-Cal State LA Students
- 4.6.7 Scholarships or scholarship donations
- 4.6.8 Programs exclusively benefiting or targeted to members of a specific group and is not open to all Cal State LA students
- 4.6.9 Salaries, fees, honorariums for Cal State LA instructors, tutors, or faculty and staff
- 4.6.10 Tickets and travel to concerts, festivals, or theme parks are prohibited because of the inherent risks and liability.

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#### **4.7 Additional Funding Requirements & Limitations**

- 4.7.1 ASI funded events shall be held on campus, unless a compelling reason can be made as to why the University is not a proper venue for the event. Off campus events, like on-campus events, must be approved by CSI to receive funding from ASI.
- 4.7.2 ASI shall fund 50% of expenses when an event is a fundraiser or if the recognized student organization is charging for attendance/participation. The student organization is required to present a complete account of the revenue generated from the event prior to receiving reimbursement.
- 4.7.3 ASI may reimburse admission tickets to events at the rates listed in the Price List. Allocations for admission to events, such as movie tickets, museums, galleries, sporting events, and performances, that charge a per person fee, shall only be reimbursed with the submittal of an actual attendance sheet (stating students' names, CSULA email, and CIN) and receipts from the performance or event. Only tickets that were purchased for and used by Cal State LA students shall be reimbursed. Additional tickets that were purchased and not used, or provided to non-student guests, shall not be reimbursed by ASI.
- 4.7.4 Merchandise
  - 4.7.4.1 Merchandise is defined as: Any goods used for the promotion of an event or entity - not limited to clothing, graduation sashes/stoles, stickers, bags, etc.

- 4.7.4.2 ASI may fund a reasonable amount, at the rates listed in the Price List up to 100% for merchandise purchased to hand out at an event or activity and made available to all students in an equitable manner, for free.
- 4.7.4.3 ASI shall not fund merchandise that is only given to members of a specific organization.
- 4.7.4.4 ASI will only fund up to 50% of the cost for merchandise if it is being sold and not given out for free to students.
- 4.7.4.5 A design of the merchandise must be submitted with the funding proposal.
- 4.7.4.6 ASI requires all recognized student organizations requesting funds for purchase of clothing and garments of any kind; to buy such items from a sweatshop free manufacturer and provide proof the business is sweatshop free. ASI can provide recognized student organizations with a list of currently known sweatshop free manufacturers.
- 4.7.5 Gift cards, cash cards, and other cash-equivalents shall only be allowed when they are used as prizes for a competitive event or awards for individual achievement and winners must be documented with a Lucky Prize Form. Guidelines for the competition or award must also be submitted that outline how the winners/awardees were selected. Gift cards may not be used as incentives to attend a program.
- 4.7.6 ASI may fund up to two (2) recognized student organization meeting expenses per semester. For the purposes of funding, a meeting is defined as a recurring, regularly scheduled gathering of student organization members (e.g., weekly, bi-weekly, or monthly) intended to conduct official organization business, activities, or member engagement.

## 5. EQUIPMENT & SUPPLIES

- 5.1. ASI may allocate funds to recognized student organizations for programming supplies that are necessary for the success of the program. Supplies include items that are designed for single use, such as decorations, utensils, or trash bags, and are typically used only for the program and discarded. ASI may consider funding supplies with a longer useful life, if the cost of the supply is under \$50 and does not require a large space for storage.
- 5.2. ASI does not provide funding for equipment, which shall be defined as: tangible property that facilitates business operations, such as tools/power tools, machines, computers, network equipment, or non-consumable items with a useful life of over one year that assists a person in achieving an action beyond the normal capabilities of a human. Parts and components that are used to build something may be considered if the project is supervised and the completed property is maintained by the University. In such cases, the sponsoring University department must provide a written statement with the funding request that articulates how the equipment is to be used and confirms the University's responsibility for the final product. Computer components that are used or installed in a personal computer shall not be funded or reimbursed.
- 5.3. ASI may fund the cost to rent equipment for the purpose of supporting an event.

- 5.3.1. A rental quote must be submitted with the funding request and a fully executed agreement, authorized by the University, shall be required for the reimbursement of funding. ASI shall not consider rental agreements signed by others who are not authorized University staff.
- 5.3.2. The transportation, use, and care of the rental equipment is at the risk of the renter/organization. University supervision and/or permits may be required for use of rental equipment on campus.

5.3.3. ASI shall not be responsible for rental equipment.

ASI may allocate funds for marketing supplies (e.g., branded tablecloth or canopy). Student organizations must identify and maintain an on-campus storage location for all funded items prior to ordering them. Marketing supply funding requests are limited to once every two (2) years per student organization.

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## 6. STUDENT ORGANIZATION TRAVEL

- 6.1. ASI may provide funding for recognized student organizations to attend or engage in academic-related or professional development events that occur off-campus and involve an overnight stay. The funding focuses on, but is not limited to, student organizations that participate in competitions which enhance the prestige of the university locally, nationally, and internationally.
- 6.2. Requests for travel reimbursement shall follow all applicable CSU and Cal State LA procedures and policies and must be registered first with the Center for Student Involvement before asking for funding, which includes travel waivers and emergency contact information for each traveler.
- 6.3. ASI may fund the travel costs including transportation, lodging, and registration fees up to the maximum amount allowable listed in the Price List.
- 6.4. ASI will only fund the travel costs for currently enrolled Cal State LA students only, which shall be documented on an attendance sheet stating the students' names, CSULA emails, and CIN.
- 6.5. Students returning from conferences shall be required to submit a written report or speak briefly at the Finance Committee meeting to share the content of the conference and how it benefited the recognized student organization and the campus. The written report should be a minimum of 250 words summarizing the topics, panels, and speakers the student(s) attended sessions for and what the student(s) learned from the sessions and how the information will benefit the recognized student organization and Cal State LA.

## 7. PREPAYMENT OF GOODS AND SERVICES FOR RSO'S

- 7.1. RSO's may request ASI's help in purchasing items prior to their event by using the Purchase Agreement Form. Advance purchasing may use approved ASI-allocated funding.

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- 7.2. If using approved-ASI-allocated funding, the purchase must have been approved by the Finance Committee and included in the Award Letter, prior to completing the Purchase Agreement Form.
- 7.3. Prepayment shall only apply to goods and services and not travel or ticketed events.

**8. UNIVERSITY DEPARTMENTS**

- 8.1. ASI's mission and responsibility is to redistribute student body fees in support of currently enrolled students at Cal State LA. ASI may provide funding for the sponsored programs and services of university departments on a one-time basis, if there is a demonstrated direct benefit to students, and if funding is available.
- 8.2. Funding may not be used for salaries, wages, or benefits for departmental employees.
- 8.3. Funding of a department, area, or program does not constitute an agreement for continued annual funding.

**9. PROCEDURES**

Additional funding procedures are documented in the Administrative Procedures for ASI and are available on the website or by request at the ASI Office.

**Policy History:**

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|-------------------------|--------------------------|
| Date Approved: 07/05/02 | Date Revised: 10/09/14   |
| Date Revised: 04/04     | Date Revised: 02/05/15   |
| Date Revised: 04/05/07  | Date Revised: 01/21/16   |
| Date Revised: 05/10/07  | Date Revised: 05/26/16   |
| Date Revised: 01/04/08  | Date Revised: 10/18/18   |
| Date Revised: 06/07/12  | Date Revised: 9/21/23    |
|                         | Date Revised: 02/09/24   |
| Date Revised: 09/20/12  | Date Revised: 09/05/24   |
| Date Revised: 07/17/14  | Date Revised: 04/24/25   |
|                         | <u>Date Revised: TBD</u> |

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