

POLICY CONCERNING FUNDING PROVIDED TO STUDENTS AND STUDENT ORGANIZATIONS

PURPOSE

The following policy has been established with the intention of providing clear guidelines regarding funding provided to students and recognized student organizations for events, activities, and travel through a funded or funding organization or contingency. Students and recognized student organizations receiving funding should be aware of their requirements and guidelines throughout the proposal, planning, implementation and reimbursement processes.

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WHO SHOULD KNOW THIS POLICY

- | | |
|---|--|
| <input type="checkbox"/> Budget Area Administrators
<input type="checkbox"/> Management Personnel
<input checked="" type="checkbox"/> Supervisors
<input checked="" type="checkbox"/> Elected/Appointed Officers | <input type="checkbox"/> Volunteers
<input type="checkbox"/> Grant Recipients
<input type="checkbox"/> Staff
<input checked="" type="checkbox"/> Students |
|---|--|

DEFINITIONS

For Purpose of this policy, the terms used are defined as follows:

Terms	Definitions
Agency Account	A financial services account used by a recognized student organization to manage funds
Contingency	A funding source intended to support unexpected or supplemental needs, including new and innovative proposals.
Funded Organization	A recognized student organization that has been granted a budget allocation to use, but not allocate to other member organizations.
Funding Organization	A recognized student organization that has been granted a budget allocation to both use and allocate to other member student organizations.
Line Item	A sub-section of a budget allocation designated for a specific use or type of expense.
Non-consumable Items	Items with a useful life of over one year.
Travel Funding Contract	Contract detailing trip itinerary, emergency contact information, compliance with this policy statement, compartment guidelines and academic standing requirements.
University Account	A fund account external from ASI Financial Services used by a university or other auxiliary department or program.

STANDARDS/REGULATIONS/PROECURES

1. OVERSIGHT

In order to ensure and maintain adherence with the philosophy and regulatory requirements connected to the use of student fees for this type of funding, a variety of oversight policies have been established. These policies have been established in accordance with standard accounting practices to ensure compliance with all ASI policy and appropriate use and disbursement of ASI funding.

a. Check Request and Original Receipts/Invoices

Any reimbursement or payment requires a completed check request and original receipts or invoices. The receipts or invoices must be itemized, show either payment made or balance due, and show the vendor's contact information. Electronic receipts or similar may be accepted when appropriate. If an invoice has a balance due to the vendor, ASI pays the business directly. An invoice can only be used for the reimbursement if it indicates that payment has been made and no balance is due. Invoices must be legitimate and contain the name, address, and phone numbers of the business.

b. Funding In Excess Of \$5,000

Any funding provided to students or student organizations in excess of \$5,000 for a single expense must be approved by the Finance Committee.

c. Contingency Funding

Contingency funding is available to all students and student organizations and is intended to be available for unexpected or supplemental needs, as well as new or innovative programs. Students and student organizations connected to a funding organization or academic college will first be referred to that source of funding, but may receive contingency funding when other funding sources are unable to be used. Requests for contingency funding must be approved by the Finance Committee.

d. Line-Item Transfers To Or From Travel

Any line-item transfer to or from a funded or funding organization's travel line item must be approved by the Treasurer/Secretary. Any line-item transfer of this nature in excess of \$1000 must be approved by the Finance Committee. Line-item transfers of this nature will not be considered until after January 1 of the fiscal year.

e. Club Agency/University Accounts

Events and travel funded under this policy are not processed through club agency or university accounts without advance notice and arrangements. Club agency and university accounts cannot be reimbursed unless this advance notice and arrangements have been made.

f. Academic Related Expenses

Events and travel funded under this policy must not be connected to any course or academic requirement. Funding may not be used for speakers, lecturers, and/or materials related to the instruction of a course. Travel funded under this policy may not be used for any registration, fees, tuition, travel costs and/or other related expenses for any course, seminar, instruction, and/or workshop that provides academic units/credit or continuing education units (CEUs).

g. Agendas and Minutes

Funded and funding organizations managing allocated budgets must prepare, distribute, post, and approve agendas and minutes in accordance with applicable law and regulations. Further, these organizations must provide copies of all agendas and minutes to Leader & Program Development.

h. Secret Ballot Voting.

Funded and funding organizations must use some form of conspicuous voting for any action involving the use or allocation of funding under this policy and the election of leadership. Forms of voting such as this include hand-raising, roll-call, standing, etc. Secret ballot voting is not allowed.

i. Fundraising and Donations

Funding under this policy is not available for fundraising activities or financial donations/contributions to charitable organizations, events, or philanthropies.

2. EVENTS AND ACTIVITIES

Events and activities funding provided under this policy are intended to support and enhance the curricular, co-curricular, and/or student life experience of California State University, Fullerton students. Events and activities funded under this policy must be free and open to and must not be designed to exclude or hinder the attendance of any or all interested CSUF students.

a. ASI Acknowledgement

All events funded under this policy must to acknowledge ASI as a funding source. The ASI logo needs to be include on all designed and printed materials, such as posters, flyers, handbills, and digital advertisements used on social media, at a clear and conspicuous size and location. In addition, the funding provided by ASI under this policy must be acknowledged during the event or activity program or announcements and with signage at the event or activity, when possible.

b. Collaborative Programming

Events and activities funded under this policy may receive funding from more than one source so long as the collaboration and funding requests are clear and transparent throughout the proposal and allocation processes.

c. Speakers and Performers

Event and activity funding provided under this policy is available for speakers, performers, and the like. If funding is used for this purpose, the individual, organization, or entity providing the performance must be payed directly and will be required to provide an invoice and appropriate tax documentation. A student or student organization may not be reimbursed for this type of funding expense.

d. Retreats

Retreat events and activities funded under this policy may only be for funded or funding organizations managing allocated budgets. Retreat events and activities for other student organizations are not fundable under this policy.

e. Banquets

Banquet events and activities funded under this policy may only be for funded or funding organizations managing allocated budgets. Banquet events and activities for other student organizations are not fundable under this policy.

3. TRAVEL

Travel funding provided under this policy is intended to support, but not entirely subsidize, travel by students and student organizations to conferences, conventions, competitions, workshops, or other professionally or officially organized events.

a. Individual Student Travel Funding

Travel funding under this policy may be provided to individual students for attendance and participation in professionally or officially organized events. With the exception of direct registration fee and other pre-arranged and authorized expense payments, all funding provided under this policy shall be disbursed on a post-travel reimbursement basis. An individual student may be provided up to \$500 of travel funding per fiscal year, regardless of the funding source, under this policy when the student is not determined to be

an Active Participant in at least one event they travel to. An individual student may be provided up to \$750 of travel funding per fiscal year, regardless of the funding source, under this policy when the student is determined to be an Active Participant in at least one event they travel to. An Active Participant is defined as an individual that is planning, presenting, performing, competing, and/or volunteering in or at the event. Whether determined an Active Participant or not, a student may only be provided a maximum of \$750 of travel funding per fiscal year, regardless of funding source, under this policy.

b. Club/Organization Travel Funding

When required in order to maintain membership or chartering from a regional, state, or national organization, travel funding may be provided to a student organization to support attendance at a required conference, convention, or similar event. A student organization may receive up to \$500 per fiscal year for this type of funding in addition to the cost of the required registration fee(s). This type of funding shall be limited to supporting the student(s) required to represent the student organization and shall be considered separately from any travel funding allowable under this policy for individual students.

c. Destination Restrictions For Travel Funding

Travel funding provided under this policy cannot be used for or in connection with travel to international destinations outside of the United States or its territories or for travel to states, regions, territories, and/or other destinations prohibited by ASI, CSUF, CSU, State of California, or Federal regulations.

d. Travel Funding Contract

Each student being provided funding under this policy must complete and sign a Travel Funding Contract, which details trip itinerary, emergency contact information, compliance with this policy statement, comportment guidelines and academic standing requirements, prior to departing on any trip. The Travel Funding Contract shall be submitted to the funding source to be maintained by the advisor and/or Leader and Program Development.

e. Travel Request Form

A Travel Request Form must be submitted as part of the proposal process for any funding being provided under this policy. The form may be submitted per individual student or for a group of students so long as a roster of students and breakdown of funding accompanies the form.

f. University Travel Requirements

The University requires that each student traveling to conferences complete certain paperwork. Students should work with their advisor or Assistant Dean for details.

g. Travel Reimbursement Requirements

In order to be reimbursed for travel, ASI requires that student meets all necessary requirements of travel, including, but not limited to:

- Executive Senate Travel Request Form
- Delegate Contract Form
- University Travel Requirements
- Written Post Travel Statement
- Original Receipts for Travel, Lodging and Registration
- Original Tickets and Boarding Passes or Proof of Travel

h. Travel Reimbursement Details

The following types of expenses are fundable under this policy:

Registration – Receipts provided for reimbursement must show the conference or event details, payment transaction details, and the name of the registrant being reimbursed.

Lodging – Receipts provided for reimbursement must show the vendor and location details, payment transaction details, and the name of the registrant being reimbursed.

Modes of Transportation – Receipts and boarding passes, when required, must show payment transaction details and the name of the registrant being reimbursed.

- Airline – Funding is available only for coach or economy class travel. Original boarding passes must be submitted for each flight in order for reimbursement to be processed.
- Train or Bus – Funding is available only for coach or economy class travel. Original boarding passes or tickets must be submitted in order for reimbursement to be processed. Punched ticket stubs are also accepted.
- Public Transportation – Funding is available only for coach or economy class travel. Original receipts are required.
- Taxi or Ride Share Service – Funding is available only for coach or economy class travel. Original receipts are required.

Travel by Personal or Rental Automobile – Funding under this policy is available for a student using a personal or rental automobile as their means of transportation.

- All students who are funded to drive must submit the proper authorization request form, a copy of their currently valid driver's license and automobile insurance, and pass the university's online defensive driver training and provide the certificate of completion.
- Personal Automobiles – Funding is available for personal automobile mileage up to the rate set by the State of California.
- Rental Automobiles – Funding is available for rental automobile costs and fuel with original receipts. Mileage is not reimbursed for rental vehicles. It is required that the insurance provided by the rental agency be purchased in order to be eligible for reimbursement. Funding is not available for the rental of vehicles larger than a minivan or small SUV.
- Area Limitation for Driving – funding is not available for driving to outside of the following area: to the North, San Francisco Bay Area; to the East, Phoenix/Tucson; and to the South, San Diego

i. Travel Reports

Each student receiving funding for travel under this policy must complete both a written and in person report on their experience. The written report must be submitted to the funding source for processing with the student's reimbursement. The written report should be a minimum of 350 words summarizing the topics, panels, and speakers the student attended sessions for and what the student learned from the sessions and how the information will be brought back to CSUF and benefit the student's organization and campus as a whole. The in person report must be given to either the student's organization or funding source covering the content of the event and how it will benefit the organization and campus as a whole.

j. Use of Private Lodging

Funding under this policy is not available for rental of private rental properties.

k. Per Diem

Funding under this policy is not available for meals or per diems.

4. ADDITIONAL FUNDING GUIDELINES

a. Awards, Gifts, Plaques and Trophies

ASI funds awards, gifts, plaques and trophies up to \$50 per individual award.

b. Clothing, Apparel, and Promotional Items

Clothing, apparel, and promotional items are fundable under this policy only if they are for a specific event or activity. Funding for clothing, apparel, and promotional items not promoting a specific event or activity is only available to funded or funding organizations managing allocated budgets. All clothing, apparel, and promotional items funded under this policy must include the ASI logo/mark or other acknowledgement when possible. The cost for these items may not exceed \$11 per unit, not include any set-up, imprint, shipping, handling, or tax charges.

c. Websites and Online Services

Funding under this policy is not available for the creation or maintenance of websites or other online webhosting services.

d. Equipment and Non-Consumable Items

Funding under this policy is not available for equipment, including computer or network equipment, or non-consumable items with a useful life of over one year.

e. Gift Cards

Funding under this policy is not available for gift cards, gift certificates or other cash value items, such as these.

f. Graduation Honors

Funding under this policy is not available for graduation related chords, sashes, ribbons, medals or any others type of honorific.

g. Newspaper and Off-Campus Advertising

Funding under this policy is not available for newspaper, including the Daily Titan, or off-campus advertising.

h. Off-Campus Outreach

Funding under this policy is not available to sponsor outreach events with the purpose of recruiting potential students from elementary, middle, high school or community college students.

i. Professional Organization Memberships

Funding under this policy is not available for individual or personal membership or dues to professional organizations. This type of expense can only be funded if the membership fees or dues are included in the cost of attendance to a conference or event and cannot be separately itemized.

DATE APPROVED: 05/07/2019