

ASI Executive Committee 23/24

Karina Ramirez Gonzalez
Chair and Chief of Staff

Ernest Cisneros
President & CEO
Vice Chair

Moy Valdez
Vice President of Finance &
Operations

Justin Cadiz
VP of Student & University Affairs

Advisors
Annie Macias
Executive Director

Ashley Fennell
Associate Executive Director



**ASSOCIATED STUDENTS, INC.
CAL STATE SAN MARCOS**

ASI Executive Committee Agenda 24 - 01

Tuesday, June 27th, 2023, at 9:00am

ASI Conference Room USU 3700

Posted: Thursday, June 22nd, 2023

ITEM	SUBJECT	PRESENTER
01	Call to Order The meeting was called to order at 9:01am	Karina Ramirez Gonzalez Chair and Chief of Staff
02	Roll Call Present: Karina, Ernest, Moy, Justin, Annie, Ashley	Karina Ramirez Gonzalez Chair and Chief of Staff
03	Recognition of Guests Shannon Gallacher (ASI Government Affairs Specialist) Antonio Hernandez Rodriguez (Cougar Care Network & Student Conduct Case Manager Specialist)	Karina Ramirez Gonzalez Chair and Chief of Staff
04 Action	Approval of Agenda Chair noted improper time; changed to 9:00am Ernest noted improper year; changed to 2023 Chair approved Agenda with edits by unanimous consent None opposed Motion carries	Karina Ramirez Gonzalez Chair and Chief of Staff
05 Action	Approval of Minutes Ernest noted Julia Glorioso missing from roll call; added Chair approved Minutes with edits by unanimous consent None opposed Motion carries	Karina Ramirez Gonzalez Chair and Chief of Staff
06 Information	Open Forum None	Karina Ramirez Gonzalez Chair and Chief of Staff
07 Action	Approval of Changes to Student Emergency Fund Policy Description: Updates include reformatting, application limitations, alternative funding availability, and update role titles Fiscal Impact: None See attached for document reviewed Presenter discussed change in policy format to match current format, clarity of open university definition, updates on language in application steps. Presenter proposes a policy that maxes the use of SEF for three times in undergrad, and once during a student's time in graduate school. Applications beyond will require additional approval. Ernest questioned limits and "special approval". Discussion about frequency of students applying multiple times per year. Antonio mentioned it's not often and hopes policy edits will encourage new students to apply. Annie suggested clarifying language to limit repeat applicants. Discussion of multiple forms and potential to condense to one. Presenter added explanation of the Middle-Class Scholarship Fund and its relation to SEF to help make students aware of their status. Addition of Middle-Class Scholarship Fund and Maxient to definitions. Also added Student Financial Services and Financial Aid in the related documents section. Moy motioned to approve the changes to the Student Emergency Fund Policy with edits Ernest – 2nd None opposed Motion Carries	Antonio Hernandez Rodriguez CCN & Student Conduct Case Manager Specialist Ashley Fennell Associate Executive Director Moy Valdez Vice President of Finance & Operations

ASSOCIATED STUDENTS, INC. OF CALIFORNIA STATE UNIVERSITY SAN MARCOS

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<p>08 Action</p>	<p>Approval of Updates to 23/24 ASI Meeting Schedule Description: Addition of summer 2023 ASI Executive Committee Meetings Fiscal Impact: None See attached for document reviewed Presenter discussed summer Exec Committee meeting schedule: Wed. 7/26 at 2pm and Mon. 8/7 at 2pm. Ernest questioned about adding Shannon to Advisor list. Ernest motioned to approve updates to ASI meeting schedule Moy – 2nd None opposed Motion Carries</p>	<p>Ashley Fennell Associate Executive Director</p>
<p>09 Information</p>	<p>Review Changes to ALF Guidelines and Application Description: Review of updated changes to ALF guidelines including updating for awarding funds and timelines for applications Fiscal Impact: None See attached for document reviewed Presenter discussed change in policy to only utilize reimbursements for ALF. Application timeline adjusted to one week before conference/event. Annie suggests reformatting to new policy format. Discussion about the student write-ups post-conference. Suggestion to utilize marketing team to showcase student experiences. Justin asked about number of students from one organization attending one conference. It is four students per conference. Annie suggested edit from “Student Organization” to “Recognized Student Organization” to match SLIC language. Discussion about Student Life Center’s involvement with ALF. Ashley clarified only groups under SLIC can apply.</p>	<p>Ashley Fennell Associate Executive Director</p> <p>Moy Valdez Vice President of Finance & Operations</p>
<p>10 Action</p>	<p>Approval of Changes to Student Organization Policy Description: Changes include updates to “sweeping” of funds and where funds should be designated Fiscal Impact: None See attached for documents reviewed – SO Policy and SOAS Guidebook Presenter reviewed change in format from previous policy to match current policy format. Policy purposefully does not include instructions for student organizations as it is in the SOAS guidebook. Policy states that RSOs that have not been active for at least two academic years will have their funds swept into the ALF account. Discussion about how RSOs will be paid since ALF is moving to reimbursement method only. Suggested change in ALF policy to say that RSOs who completed the leadership academy, “may be eligible for additional funding, if available, or up to [amount]”. Discussion about potentially having to revisit this process every year. SLIC will need to provide a list of RSOs who completed the training in order to obtain additional funding. Presenter edited the ALF application to include question about whether the RSO had completed SLICs leadership academy. At the will of the Chair, the meeting was extended Moy motions to approve Changes to Student Organization Policy with edits Justin – 2nd None opposed Motion carries</p>	<p>Ashley Fennell Associate Executive Director</p> <p>Annie Macias Executive Director</p> <p>Shannon Gallacher Government Affairs Specialist</p>



11 Information	Reports Annie – FY to close on July 1, ASI in the process of External Audit (Moy and Ernest on audit committee) Ashley – Finalizing onboarding Exec trainings	Karina Ramirez Gonzalez Chair and Chief of Staff
12 Information	Announcements Ernest – out Thursday to Monday Annie – out on a similar timeline as Ernest	Karina Ramirez Gonzalez Chair and Chief of Staff
13 Action	Adjournment Meeting was adjourned at the will of the Chair at 10:09am	Karina Ramirez Gonzalez Chair and Chief of Staff

* Public comment will be limited to a maximum of 5 minutes per guest. Chair will determine allocated amount per meeting.

I, Karina Ramirez Gonzales, 23/24 ASI Chair & Chief of Staff, hereby certify that the above minutes were approved by Executive Committee at a regularly scheduled meeting held on August 7th, 2023.

Karina Ramirez Gonzalez
Karina Ramirez Gonzalez (Aug 12, 2023 01:43 PDT)

08/12/2023



POLICY: STUDENT EMERGENCY FUND

EFFECTIVE DATE: JANUARY 11, 2016

REVISED DATE: JUNE 27, 2023

DEFINITIONS

ACE Scholars: CSUSM Program that supports former foster youth.

Cougar Care Network: Support Services department under CSUSM Dean of Students Office that provides information, services, and support to students in need.

Degree Seeking Program: Major or program that culminates in the attainment of a bachelor's or master's degree.

Maxient: CSUSM Internal database for managing student cases.

Middle Class Scholarship: Financial Aid opportunity overseen by CA Student Aid Commission for students with family income and assets up to \$201,000

PURPOSE

The ASI Student Emergency Fund (SEF) provides compassionate assistance to currently enrolled CSUSM students who encounter unforeseen financial emergencies or catastrophic events that disrupt their progress toward a degree. These funds are not intended to be used for routine expenses nor as a consistent supplement to a student's education funding sources. These funds are not required to be repaid.

POLICY

- I. Funding for ASI Student Emergency Fund is determined annually during the ASI budget allocation process in the spring for the subsequent fiscal year.
- II. Funds for ASI Student Emergency Fund are managed by and contained within the budget of the ASI Vice President of Finance & Operations
- III. All requests must be urgent in nature.
- IV. Automatic denials include:
 1. Student applicant is not enrolled in the current semester at CSUSM.
 2. Student applicant has exceeded financial aid cost of attendance.
 3. Student is not in a degree seeking program (Open University).

4. Student is not enrolled in a program that pays the ASI Student Body Fee
 - a) However, money collected from other revenue sources can fund these student applicants as long as funds are available.
- V. Funds will not be awarded to the same student more than once during an academic year. Committee will consider academic year July 1- June 30.
1. Summer applicants must be enrolled in either summer and/or fall classes.
 - a) Summer awards through Financial Aid and Student Financial Services will need to be awarded to the prior spring semester disbursement in order to avoid delay of award to the student recipient
 - b) If a student is an incoming freshman, funds cannot be disbursed until fall semester Financial Aid awards are processed. Funds cannot be awarded for a previous semester because they were not previously enrolled.
 2. Winter applicants must be enrolled in winter intersession and/or spring classes.
 3. Students will be ineligible to apply more than once during the academic year.
 - a) Exceptions can be made if there has been another financial emergency or catastrophic, unforeseen circumstance unrelated to prior application, the student may apply again. Team will make final approval or denial decision.
 4. Students will only be eligible three (3) times for funding during the duration of their time at CSU San Marcos as an undergraduate student. Graduate students are eligible one (1) time for funding during their program.
 - a) Any applications received beyond this maximum will be reviewed but not guaranteed. Special approval will be required by ASI Vice President of Finance & Operations.
- VI. ACE Scholar students will be encouraged to first reach out to ACE at ace@csusm.edu before applying to ASI Student Emergency Fund to ensure students explore all available options.
- VII. Students seeking funding for medical related expenses under \$500 will be encouraged to contact and apply for SHCS Health Assistance Fund prior to ASI SEF application submission.
- a. If funding request is over \$500, student is eligible to apply for both funding sources.
 - b. Application will ask student if they have received funding or applied for SHCS Health Assistance Fund.

PROCEDURES

- I. The application is located online on the ASI website and requests are automatically downloaded into Maxient.
 1. Application, backup documentation, and student enrollment will be reviewed and verified by Cougar Care Network (CCN) upon review of application and documentation.
 - a) Submitted applications must be thorough and include as much information as possible regarding the need for emergency funds. Student must also submit backup documentation for emergency situation.

- b) Student will meet with a member of the Cougar Care Network prior to application being sent to Team. This could include in person, phone call, or zoom/skype/Teams meetings. During this meeting, CCN will do intake with student and connect them with additional resources.
 - c) CCN will verify current enrollment, confirmation in degree seeking program, and enrollment in program that pays the ASI student body fee.
 - d) CCN will review student's request, submitted documentation, and confirmation it meets SEF policies.
 - 1. CCN will also review if student has received Middle Class Scholarship to determine if student would like to continue SEF award process. If student awarded SEF, they would be responsible for any back payment related to the Middle Class Scholarship. Application will include question about if student has received Middle Class Scholarship.
 - 2. An application will be denied if a student has not responded to Cougar Care Network after three outreach efforts (phone call, email to personal/CSUSM email, etc.) for back-up documentation or for required meeting with CCN member.
 - a) Student will be asked to re-submit and provide additional documentation or information regarding the emergency situation.
 - b) If denied due to Cost of Attendance, student will be notified of Financial Aid appeals process.
- II. Awards are determined by the Student Emergency Fund Team which includes university staff members who work directly with the Cougar Care Network, as well as the ASI Vice President of Finance & Operations and reviewed by an ASI staff member, as designated by the ASI Executive Director.
- a) A decision must be made by a majority of the team members.
 - b) Team will consider awarding \$350 based on documented need in the form of a Financial Aid Scholarship.
- III. Funds are distributed to the SEF recipient in the form of a Financial Aid Scholarship.
- a) An ASI staff member will send notification of award or denial to student applicant via their campus email account after review and approval by ASI Student Emergency Fund team.
 - b) Notification and student information sent to Financial Aid who will apply award to student account. Student Financial Services will post money to student account. Payment will be issued by Accounts Payable to student in next check run or delivered via Direct Deposit
 - c) Accounts Payable will deliver check to Student Financial Services.
 - d) Cashiers will notify student that the check is available for pick-up. If campus is closed, check will be mailed to student address in their MyCSUSM.
 - e) CSUSM will bill back ASI for Scholarship award via invoice process.
- IV. In the event that the SEF funds are depleted, the ASI Vice President of Finance & Operations can choose to transfer funds from ASI Leadership Fund and/or request that additional funds be transferred into SEF from reserves or from funds donated to the

Student Emergency fund via donations made on the University Advancement website or payroll deductions.

- V. Funds donated to the ASI Student Emergency Fund via donations made on the University Advancement website or payroll deductions will be transferred to ASI SEF fund at the beginning of each fiscal year.
- VI. A list of all applicants, both approved and denied, will be maintained by an ASI Professional Staff member in coordination with other members of the ASI Student Emergency Funding Team. List will include student names, student ID, and amount awarded, if applicable.
 - a) Each applicant will also receive information about any available Financial Aid awards and/or loan opportunities available to them.

RELATED DOCUMENTS

- I. Student Emergency Fund application
https://cm.maxient.com/reportingform.php?CSUSanMarcos&layout_id=11
- II. ASI Student Emergency Fund website
https://www.csusm.edu/asi/services/emergency_fund.html
- III. CSUSM Student Financial Services
<https://www.csusm.edu/sfs/index.html>
- IV. CSUSM Financial Aid
<https://www.csusm.edu/finaid/index.html>

ASI Meeting Schedule 2023/2024

ALL Committee Meetings will take place via in USU 2310 unless otherwise indicated on posted agenda

Board of Directors	
Date	Time
Friday, August 18	2:30 - 4:00pm
Friday, September 1	2:30 - 4:00pm
Friday, September 15	2:30 - 4:00pm
Friday, October 6	2:30 - 4:00pm
Friday, October 20	2:30 - 4:00pm
Friday, November 3	2:30 - 4:00pm
Friday, November 17	2:30 - 4:00pm
Friday, December 8	2:30 - 4:00pm
Friday, February 2	2:30 - 4:00pm
Friday, February 16	2:30 - 4:00pm
Friday, March 1	2:30 - 4:00pm
Friday, March 15	2:30 - 4:00pm
Friday, April 5	2:30 - 4:00pm
Friday, April 19	2:30 - 4:00pm
Friday, May 10	2:30 - 4:00pm
Advisors: Ashley Fennell & Annie Macias	

Student Advocacy Committee	
Date	Time
Friday, September 22	2:30 - 4:00pm
Friday, October 27	2:30 - 4:00pm
Friday, December 1	2:30 - 4:00pm
Friday, January 26	2:30 - 4:00pm
Friday, February 23	2:30 - 4:00pm
Friday, March 29	2:30 - 4:00pm
Friday, April 26	2:30 - 4:00pm
Advisors: Jason Schreiber & Ashley Fennell	

Internal Operations	
Date	Time
Friday, September 8	2:30 - 4:00pm
Friday, October 13	2:30 - 4:00pm
Thursday, November 9	12:00 - 1:00pm
Friday, February 9	2:30 - 4:00pm
Friday, March 8	2:30 - 4:00pm
Friday, April 12	2:30 - 4:00pm
Advisors: Annie Macias, Talisha St John, and Deborah Davis	

Executive Committee	
Date	Time
Tuesday, June 27	9:00 - 10:00am
Wednesday, July 26	2:00 - 3:00pm
Monday, August 7	2:00 - 3:00pm
Monday, September 11	1:00 - 2:00pm
Monday, October 16	1:00 - 2:00pm
Monday, November 13	1:00 - 2:00pm
Monday, December 18	1:00 - 2:00pm
* Schedule dependent upon committee availability	
Advisors: Ashley Fennell & Annie Macias	

Elections Committee*	
Date	Time
TBD	TBD
* Schedule dependent upon committee availability	
Advisors: DOS Representative and OIE Representative	

Awards Committee*	
Date	Time
TBD	TBD
* Schedule dependent upon committee availability	
Advisors: Ashley Fennell & Daphne Joie Calaguas	

BOD Professional/Personal Development		
Date	Time	Topic
8/16- 8/18/22	All Day	BOD Training
8/21 - 8/23/22	All Day	ASI Retreat
Friday, September 1	4-5:30	TBD
Friday, October 6	4-5:30	TBD
Friday, November 3	4-5:30	TBD
Friday, December 8	4-5:30	TBD
1/16-1/17/23	All Day	ASI Retreat
Friday, January 19	All Day	BOD Mid-Year Retreat
Friday, February 2	4-5:30	TBD
Friday, March 1	4-5:30	TBD
Friday, April 5	4-5:30	TBD
Advisor: Ashley Fennell		

Personnel Committee*	
Date	Time
TBD	TBD
* Schedule dependent upon committee availability	
Advisors: Alan Brian & Michelle Hinojosa	



CSUSM-ASI Leadership Funding
On-Campus Events Application and Guidelines
22/2323/24

ASI Mission Statement

ASI serves, engages, and empowers students.

ASI Leadership Funding Programs

Associated Students, Inc. (ASI) provides ASI Leadership Funding (ALF) for student organizations' events and student attendance at professional conferences. The ASI ~~Executive Vice President~~ **Vice President of Finance & Operations** and professional staff members determine the allocation of these funds. All such allocations are made in accordance with the ASI Bylaws and CSUSM-ASI Viewpoint Neutrality Policy and General Procedures.

ASI has allocated approximately \$~~3035~~,000 to ALF this year. Approved funding for a registered student organization (RSO) on-campus events is based on eligibility and compliance with the procedures outlined below.

Awarded funds are on a first come-first served basis. ~~Application must be submitted at least 48 hours prior to event date.~~ These funds are for reimbursement to members or for payment to vendors. Events must take place during the academic year. An RSO may not utilize ASI's logo or name in the advertisement or promotion of an event. ASI's decision to fund an event does not constitute co-sponsorship. All events must be conducted in compliance with applicable University rules, regulations and policies, including facilities use policies if the event will require reservation and use of University space as well as Sodexo's first right of refusal for food purchases over \$250. All events must be compliant with and not violate any federal, state or local law, statute, ordinance, code, or regulation.

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All students are encouraged to request funding early in the year in order to secure funds prior to their event. Application must be submitted at least ~~48 hours~~ one (1) week prior to event ~~date~~ taking place. The applicant and all signers will receive an email noting the decision on the applications within 5 business days of application. If approved, recipients are required to submit receipts or payment requests no later than June ~~5th~~ 7th of the academic year in which the event takes place; such receipts should be sent to alf@csusm.edu or brought to the ASI office in USU 3700 in order to process payments for the awarded funds.

I. RSO On-Campus Event Funding Process

(A) Application Process

The application for funding will begin on a date as determined by ASI and posted on its website or through some other announcement to the campus community, and will remain open

If you have any questions, contact ASI at USU 3700 or via email at ALF@csusm.edu Phone: (760) 750-4990

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until ASI funds have been fully distributed. All applications will be processed in accordance with viewpoint neutral application procedures and applicable deadlines.

Funding decisions shall be made in the order of when the application was received. Awarded funds are on a first come, first served basis. Events must take place during the academic year. Awards must be made in conformance with ASI's viewpoint neutrality requirement.

All of the individuals making a funding decision shall use a standardized evaluation form. The forms will be maintained by ASI for a period of four (4) years.

Application must be submitted at least ~~48 hours~~ one (1) week prior to event taking place. The applicant will receive an email noting the decision on the applications within 5 business days of application. If approved, recipients are required to submit receipts or payment requests no later than June ~~5th-7th~~ of the academic year in which the event takes place; such receipts should be sent to alf@csusm.edu or brought to the ASI office in USU 3700 in order to process payments for the awarded funds.

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Field Code Changed

(B) Eligibility; General Requirements and Conditions

An RSO shall be eligible to obtain ALF funding if it satisfies the following requirements at the time the application is submitted: (1) the RSO is properly registered as a recognized student organization in good standing through Student ~~Life & Leadership~~ Leadership & Involvement Center (SLIC), and (2) a representative of the RSO has attended a financing workshop prior to submitting their first funding application for the academic school year.

All applications for ALF funding by an eligible RSO shall be granted in the amount requested provided that (1) ALF funds are still available at the time the application is submitted, and (2) the RSO-sponsored event or program satisfies the following requirements and conditions:

1. ~~1.~~ Application was submitted to ASI at least one (1) week prior to event taking place

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2. The event will be held on-campus.

2. The event will be free to attend.

3. The application must contain a budget detailing how the funds will be used. Funding may only be used for consumable items and facility costs such as food for attendees, paper products, event/program advertising, and rental or cleaning costs. If food is purchased, it must follow campus's first right of refusal policies.

4. Funding is **not** available, and may not be used, for any of the following: door prizes, raffles, opportunity drawings, honorariums, speaker fees, donations, gifts, or give-away items.

5. An RSO may receive up to \$500 in ALF funding per semester.
6. If an event or program is not open to the entire campus community, the maximum ALF amount that may be requested is **\$250**.
7. If an event or program is open to the entire campus community, the maximum ALF amount that may be requested is **\$500**.
8. An RSO may co-sponsor an event with another RSO. For a co-sponsored event, each RSO is eligible to submit an application for the maximum amount. Co-sponsored events can be funded up to \$1,500. ALF contribution for co-sponsored funding is **not** available for individual RSO members.
9. Incomplete applications will be rejected and must be re-submitted as a new application. Must still follow application timeline requirements.
10. Use of funding for any activity not disclosed in the application will disqualify an RSO from receiving any future ALF funding for a period of one academic year.
11. Funding may only be used or expended in support of the specific program or event identified in the funding application.

(C) Reconsideration of Application Decision

Each RSO shall submit its application to ASI ~~Executive Vice President~~ Vice President of Finance & Operations electronically. No later than the close of business five business days from the date the application is submitted, ASI ~~Executive Vice President~~ Vice President of Finance & Operations must approve or deny the application and deliver their decision in writing via electronic communication to the person that submitted the application on behalf of the RSO. Email is permissible for this notification. If the application satisfies the criteria set forth above and ALF funds are available, ASI ~~Executive Vice President~~ Vice President of Finance & Operations must approve the application as submitted. If ASI ~~Executive Vice President~~ Vice President of Finance & Operations denies the application or decreases the original funding request amount, ASI ~~Executive Vice President~~ Vice President of Finance & Operations must (1) issue their decision in writing to the RSO, and (2) identify the specific reasons for the denial or reduction. If the RSO disagrees with the decision, the RSO may request a meeting with ASI ~~Executive Vice President~~ Vice President of Finance & Operations or ASI ~~Executive Vice President~~ Vice President of Finance & Operations's designee within three (3) business days of receipt of the decision. The meeting shall take place within five (5) business days of the request pending scheduling availability. At the meeting, the parties will discuss the application and ASI ~~Executive Vice President~~ Vice President of Finance & Operations shall explain ~~ASI Executive Vice President's~~ reasons for any reduction in amount or denial of the application. The RSO will receive written notice of ASI ~~Executive Vice President~~ Vice President of Finance & Operations' decision within three (3) business days after the meeting. If the decision confirms the denial of or

decrease in funding, the decision will explain and state in writing the reasons why the funding was denied or decreased.

II. Appeal Process

(A) Generally

If the RSO contends that ASI ~~Executive~~ Vice President of Finance & Operations's post-meeting decision violates or did not comply with the viewpoint neutrality requirement, it may file an appeal. The RSO has five (5) business days after receipt of the written post-meeting decision to file an appeal. Such appeal must be in writing and state the reason the RSO believes the application was wrongfully denied or reduced. The appeal shall be limited to the question of whether the application was properly denied pursuant to the policy or whether viewpoint or opinion played an impermissible role in the denial or reduction.

The CSUSM Vice President of Student Affairs ("VPSA") or the VPSA's designee will review the appeal and issue a written decision as soon as reasonably practicable but no later than ten (10) business days of receipt of appeal.

(B) Standard of Review

The VPSA or the VPSA's designee shall determine "de novo" (*i.e.*, without any deference to the ASI ~~Executive~~ Vice President of Finance & Operations's decision) whether the funding decision complied with the terms of the policy or whether it violated the viewpoint neutrality requirement.



ALF On-Campus Events
Student Organization Application
2022/20232023/2024

Contact Information

Student Organization: _____

Requestor (Student Org Member): _____ Phone: _____
 Email: _____

President: _____ Phone: _____
 Email: _____

Faculty/Staff Advisor: _____ Phone: _____
 Email: _____

Event Information

Title: _____

Date of event: _____ Time: _____

Location: _____ Expected Attendance: _____

Total estimated total cost of event: \$ _____

Total co-sponsorship amount from other source(s) of funding: \$ _____

Total Event Estimated Itemized Budget

Explanation of Expense	Cost
Total ALF funds requested	

President's Signature	Date	Faculty/Staff Advisor Signature	Date

If you have any questions, contact ASI at USU 3700 or via email at ALF@csusm.edu Phone: (760) 750-4990

ASI Use Only:

<i>ASI Executive Vice President of Finance & Operations</i> or Designee	\$		Amount Approved	<i>ASI Professional Staff</i>
<small><i>Decision</i></small>				

If you have any questions, contact ASI at USU 3700 or via email at ALF@csusm.edu Phone: (760) 750-4990

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Revised: 042420



**CSUSM-ASI Leadership Funding
Conference Policy and Procedure**
22/2323/24

ASI Mission Statement

ASI serves, engages, and empowers students.

ASI Leadership Funding Generally

Associated Students Inc. (ASI) provides ASI Leadership Funding (ALF) for student organizations’ events and student attendance at professional conferences. The ASI ~~Executive Vice President~~ **Vice President of Finance & Operations** and professional staff members determine the allocation of these funds. All such allocations are made in accordance with the ASI Bylaws and CSUSM-ASI Viewpoint Neutrality Policy and General Procedures.

This Policy and Procedure governs approval of funding for student attendance at professional conferences. The mechanics of how to account for and receive reimbursement for approved student attendance at professional conferences are set forth in a separate policy entitled “Accounts payable,” which can be found in the ASI website under Policies and Procedures. Student attendance at professional conferences refers to:

A. Student conference includes, but is not limited to, conferences, seminars, symposia, workshops, retreats or similar events and meetings (together, called “conference activity”) selected by the student.

ASI has allocated approximately \$~~325,000~~ to ALF this year. Approved funding is based on eligibility and compliance with the procedures outlined below, and with the procedures in the ASI Accounts Payable policy. Awarded funds are on a first come-first served basis. Conferences must take place during the academic year.

Approved funding is based on eligibility per the ALF Guidelines and Instructions. Awarded funds are on a first come, first served basis. **Application due at least 48 hours one (1) week prior, PRIOR to conference attendance.** The funding is available for conferences held between ~~October 15, 2022~~ **August 1, 2023** and ~~May 24, 2024~~ **May 24, 2024**. We will not fund any conferences after ~~May 24, 2024~~ **May 24, 2024**. Proof of attendance, receipts, and event write-up for this conference must be presented no later than ~~June 27, 2024~~ **June 27, 2024**.

The applicant will receive an email noting the decision of their application. If approved, recipients are required to submit proof of attendance, receipts and a written statement via email to alf@csusm.edu in order to process payment for their awarded funds. Students will not receive reimbursement unless proper documentation is submitted. **Students will only receive reimbursement funds for the total of receipts submitted up to the award total amount.**

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If you have any questions, contact ASI at USU 3700 or via email at alf@csusm.edu Phone: (760)750-4990

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Viewpoint Neutrality Policy

All student requests for travel and conference funding will be subject to the viewpoint neutral policies and procedures set forth in “CSUSM-ASI Viewpoint Neutrality Policy and General Procedures.”

Application and Approval Procedure

All student requests for student attendance at professional conferences must comply with Accounts Payable policy.

ASI shall not, in administering this Policy, evaluate or consider in any way the nature or content of the conference activity other than to verify that the described conference activity actually exists, and that it complies with all applicable University rules, regulations, and policies and all applicable federal, state or local laws, statutes, ordinances, codes, or regulations. ASI’s role with respect to reimbursement for student conference activity shall be limited to (i) verifying that the stated conference is actually taking place,

The application for funding will begin on a date as determined by ASI and posted on its website or through some other announcement to the campus community, and will remain open until ASI funds have been fully distributed. All applications will be processed in accordance with viewpoint neutral application procedures and applicable deadlines. See deadlines below.

Funding decisions shall be made in the order of when the application was received. Awarded funds are on a first come, first served basis. Conferences must take place during the academic year. Awards must be made in conformance with ASI’s viewpoint neutrality requirement

Provisions of California Assembly Bill No. 1887

Effective September 27, 2016, California Assembly Bill No. 1887 prohibits ASI from approving a request for ASI-funded or ASI-sponsored travel to any state that, after June 26, 2015, has enacted a law that:

- Voids or repeals or has the effect of voiding or repealing, existing state or local protections against discrimination on the basis of sexual orientation, gender identity, or gender expression; or
- Has enacted a law that authorizes or reflects discrimination against same-sex couples or their families, or on the basis of sexual orientation, gender identity, gender expression, as specified, subject to certain exceptions.

This prohibition currently extends to the following states: Alabama, Arizona, Arkansas, Florida, Georgia, Idaho, Indiana, Iowa, Kansas, Kentucky, Louisiana, Mississippi, Montana, North Carolina, North Dakota, Ohio Oklahoma, , South Carolina, South Dakota, Tennessee, Texas, Utah, and West Virginia. This list may be subject to change.

If you have any questions, contact ASI at USU 3700 or via email at alf@csusm.edu Phone: (760)750-4990

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Reconsideration of Application Decision

If ASI denies the student travel/conference application or decreases the original funding request amount, ASI must (1) issue its decision in writing to the student, and (2) identify the specific reasons for the denial or reduction. If the student disagrees with the decision, the student may request a meeting with ASI ~~Executive Vice President~~ Vice President of Finance & Operations or ASI ~~Executive Vice President's~~ Vice President of Finance & Operations's Vice President of Finance & Operations's designee within three business days of receipt of the decision. The meeting shall take place within five (5) business days of the request. At the meeting, the parties will discuss the application and the ASI administrator shall explain the reasons for any reduction in amount or denial of the application. The student will receive written notice of ASI's decision within three (3) business days after the meeting. If the decision confirms the denial of or decrease in funding, the decision will explain and state in writing the reasons why the funding was denied or decreased.

Appeal Process

(A) Generally

If the student contends that ASI's post-meeting decision violates or did not comply with the viewpoint neutrality requirement, the student may file an appeal within five (5) business days after receipt of the written decision to file an appeal. Such appeal must be in writing and state the reason the student believes the application was wrongfully denied or reduced. The appeal shall be limited to the question of whether the application was properly denied pursuant to the policy or whether viewpoint or opinion played an impermissible role in the denial or reduction.

The CSUSM Vice President of Student Affairs ("VPSA") or VPSA's designee will review the appeal and issue a written decision as soon as reasonably practicable but no later than ten (10) business days of receipt of appeal.

(B) Standard of Review

The VPSA or VPSA's designee shall determine "de novo" (i.e., without any deference to the decisions below) whether the funding decision complied with the terms of the policy or whether it violated the viewpoint neutrality requirement.



CSUSM-ASI Leadership Funding
Conference and Travel Policy and Procedure
2022/2023/23/24

ALF Conference Guidelines

- Applicant must be a currently enrolled CSUSM student
- Conference must follow all guidelines outlined in this packet
- No more than four students attending the same conference may obtain ALF funds.
- International conferences will not be funded.
- Student may attend a conference only once per semester.
 - May apply for up two within academic year (i.e. one in fall and one in spring). Summer and winter intersession shall be considered fall semester.
- Student will only receive funds upon submit of proof of attendance and written statement.
- Club sports teams and other student recreation sports may only apply if the individual or team is participating in a national title championship.
- Incomplete applications will be denied, at the discretion of the ASI ~~Executive~~ Vice President of Finance & Operations.

Funding

Paid as follows:

- ❖ One day in-state conference **within 400 miles from campus**: \$100.00 award
- ❖ Two days or more conference **within 400 miles from campus**: \$250.00 award
- ❖ One day conference **outside of 400 miles from campus**: \$200.00 award
- ❖ Two days or more conference **outside of 400 miles from campus**: \$425.00 award

Instructions for Application:

1. ~~Complete all forms in this packet.~~ Submit form online. Application must include
2. ~~Attach a copy of the advertised conference,~~ which must include title, subject, location and dates.
2. Submit completed packet ~~online to ASI at least one (1) week~~ prior to conference dates.
APPLY EARLY so you can get confirmation of approval or denial prior to conference attendance.
3. ~~The applicant will receive an email noting the decision of their application. If approved, recipients are required to submit proof of attendance, receipts and a written statement via email to alf@csusm.edu within 10 business days in order to process payment for their awarded funds. Students will not receive reimbursement unless proper documentation is submitted. Students will only receive reimbursement funds for the total of receipts submitted up to the award total amount.~~
- 4.

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If you have any questions, contact ASI at USU 3700 or via email at alf@csusm.edu Phone: (760)750-4990

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CSUSM-ASI Leadership Funding
Conference Application
2022/202323/24

Today's Date							
Your name				Student ID #			
Address			City			State	ZIP
Campus Email				Phone			
First day attending Conference:	At:	am/pm	Last day attending Conference:	At:	am/pm		
Name of Conference							
Complete address of Conference							
<ul style="list-style-type: none"> • Circle One: ❖ One day conference within 400 miles from campus: \$100.00 ❖ One day conference outside of 400 miles from campus: \$200.00 ❖ Two days or more conference within 400 miles from campus: \$250.00 ❖ Two days or more \ conference outside of 400 miles from campus: \$425.00 							
<p align="center">I hereby certify that I am a currently enrolled student at California State University San Marcos. I agree that within ten (10) business days of my return from the conference, I will submit it to USU 3700 or to alf@csusm.edu proof of my attendance at the conference.</p>							
Your Signature							
Print your name						Date	

FOR ASI USE ONLY			
Approved Amount			
ASI Executive Vice President of Finance & Operations			Date
ASI Professional Staff Designee			Date

If you have any questions, contact ASI at USU 3700 or via email at alf@csusm.edu Phone: (760)750-4990

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RELEASE OF LIABILITY, PROMISE NOT TO SUE, ASSUMPTION OF RISK AND AGREEMENT TO PAY CLAIMS

Activity: _____

Activity Date(s) and Time(s): _____

Activity Location(s): _____

In consideration for being allowed to participate in this Activity, on behalf of myself and my next of kin, heirs and representatives, I release from all liability and promise not to sue the State of California, the Trustees of The California State University, California State University San Marcos, Associated Students Inc., California Student University San Marcos Corporation(CSUSM Corporation) , and their employees, officers, directors, volunteers and agents (collectively "University") from any and all claims, including claims of the University's negligence, resulting in any physical or psychological injury (including paralysis and death), illness, damages, or economic or emotional loss I may suffer because of my participation in this Activity, including conference to, from and during the Activity.

I am voluntarily participating in this Activity. I am aware of the risks associated with traveling to/from and participating in this Activity, which include but are not limited to physical or psychological injury, pain, suffering, illness, disfigurement, temporary or permanent disability (including paralysis), economic or emotional loss, and/or death. I understand that these injuries or outcomes may arise from my own or other's actions, inaction, or negligence; conditions related to conference; or the condition of the Activity location(s). Nonetheless, I assume all related risks, both known or unknown to me, of my participation in this Activity, including conference to, from and during the Activity.

I agree to hold the University, Associated Students Inc. and CSUSM Corporation harmless from any and all claims, including attorney's fees or damage to my personal property that may occur as a result of my participation in this Activity, including conference to, from and during the Activity. If the University, Associated Students Inc. or CSUSM Corporation incur any of these types of expenses, I agree to reimburse the University, Associated Students Inc. or CSUSM Corporation. If I need medical treatment, I agree to be financially responsible for any costs incurred as a result of such treatment. I am aware and understand that I should carry my own health insurance.

I am 18 years or older. I understand the legal consequences of signing this document, including (a) releasing the University, Associated Students Inc. and CSUSM Corporation from all liability, (b) promising not to sue the University, Associated Students Inc. or CSUSM Corporation, (c) and assuming all risks of participating in this Activity, including conference to, from and during the Activity.

I understand that this document is written to be as broad and inclusive as legally permitted by the State of California. I agree that if any portion is held invalid or unenforceable, I will continue to be bound by the remaining terms.

I have read this document, and I am signing it freely. No other representations concerning the legal effect of this document have been made to me.

Participant Signature: _____ Participant Name (print): _____

Emergency Contact (print): _____ Phone: _____

If Participant is under 18 years of age:

I am the parent or legal guardian of the Participant. I understand the legal consequences of signing this document, including (a) releasing the University, Associated Students Inc. and CSUSM Corporation from all liability on my and the Participant's behalf, (b) promising not to sue on my and the Participant's behalf, (c) and assuming all risks of the Participant's participation in this Activity, including conference to, from and during the Activity. I allow Participant to participate in this Activity. I understand that I am responsible for the obligations and acts of Participant as described in this document. I agree to be bound by the terms of this document.

I have read this document, and I am signing it freely. No other representations concerning the legal effect of this document have been made to me.

Signature of Minor Participant's Parent/Guardian _____ Name of Minor Participant's Parent/Guardian (print) _____ Date _____

If you have any questions, contact ASI at USU 3700 or via email at alf@csusm.edu Phone: (760)750-4990

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STUDENT CONDUCT AGREEMENT

Event/Activity: _____

Event Date: _____

Student Name: _____ Student ID Number: _____

In consideration for my participation in the event/activity identified above, I or my parent or legal guardian on my behalf (student under 18 years of age), hereby agree to the following conditions:

General Notice

I acknowledge that as a student of Cal State San Marcos, I am representing the organization sponsoring my participation in the above event/activity and the student body of my campus and the California State University (CSU) system. As a responsible individual of the CSU community, I understand that I am expected to conduct myself in a manner consistent with the rules and regulations of my campus, the hosting organization, the CSU, and all applicable state and federal laws. I also understand that any violation of these rules, regulations or laws may result in my expulsion from the event/activity and further disciplinary action by Cal State San Marcos.

If I am expelled from the event/activity, Cal State San Marcos shall not be held responsible for any financial loss I may incur, including but not limited to those incurred as a result of paid registration fees, conference expenses, legal expenses, personal damages, or other expenses related to my participation in this event/activity and my violation of this Student Conduct Agreement.

By signing this form, I further agree that I will not participate in the following activities:

- Use, possession, or distribution of alcohol while at this event/activity and/or use, possession of alcohol by any underage individual.
Use, possession, or distribution of any illegal or illicit drug.
Sexual assault or indecent exposure. Sexual assault is defined as the implied use or threatened use of force to engage in any sexual activity against another person's will.
Behavior which threatens the emotional or physical well-being and/or safety of participants including but not limited to any form of fighting.
Unauthorized use of any fire safety equipment, including the activation of alarms or extinguishers without immediate cause.
Possession of any weapons, dangerous or explosive devices or chemicals.

Process

Alleged violations will be reviewed by the appropriate CSUSM faculty/staff supervisor for determination of the need for disciplinary action upon return to campus.

By signing below, I acknowledge that I have read, understood, and agree to abide by these student conduct guidelines.

Signature of Student Participant / Date Printed Name

Signature of Parent/Guardian If Student Is Under 18 Years of Age / Date Printed Name

If you have any questions, contact ASI at USU 3700 or via email at alf@csusm.edu Phone: (760)750-4990

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CSUSM-ASI Leadership Funding
Conference Application
2022/202323/24

ONLY COMPLETE THIS PAGE IF YOU WILL BE TRAVELING BY AIRPLANE

RELEASE AND HOLD-HARMLESS STATEMENT

I, _____, am a student at California State University San Marcos, one of the campuses of the California State University (CSU).

I am/will be participating in a CSU-affiliated program which requires air travel. (CSU-affiliated program includes any program offered by, or pursuant to a program of, the California State University, any campus of the California State University, any student body organization, or any organization affiliated with any such organization or with any combination thereof.) My participation in this program is voluntary.

I have been informed, and I know, that 1) air travel involves risks which can result in damage to property, injury to persons, and death; and 2) the CSU assumes no liability for damage, injury, or death occurring on such travel. With this knowledge and information, I agree to participate in the program, and the air travel, at my own risk.

I release and hold harmless the state of California, the California State University, California State University San Marcos, and each and every officer, employee and agent of each of them, from any and all claims and causes of action that I may have against any of these institutions or persons, by reason of any accident, illness, injury, death, or other consequences resulting directly or indirectly from or in any manner arising out of, or in connection with, my being a passenger on an airplane pursuant to my participation in the CSU-affiliated program.

This release and hold-harmless shall also be binding on my heirs, assigns, successors, and all other persons who may claim through me.

Date: _____

Signature: _____

Print Name: _____

Street Address: _____

City, State, Zip Code: _____

If you have any questions, contact ASI at USU 3700 or via email at alf@csusm.edu Phone: (760)750-4990

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POLICY:

STUDENT ORGANIZATION FUND ACCOUNTS

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ACCOUNTS PAYABLE POLICY

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EFFECTIVE DATE: SEPTEMBER 21, 2018

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REVISED DATE: ~~DATE~~ **APRIL 24, 2023**

APPROVAL DATE: DATE

DEFINITIONS

Detail code: Four letter code utilized by CSUSM Cashier's Office to identify correct fund account.

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Expenditure Request Form (ERF): ASI Form used to process reimbursements and payments.

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Fund Account: Five number code assigned to recognized student organization in the CSUSM financial system.

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Officially recognized student organization: Approved club that meets requirements and has completed mandatory recognition steps with Student Leadership & Involvement Center.

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Student Leadership & Involvement Center (SLIC): Department on CSUSM campus that maintains oversight of recognized student organizations.

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PURPOSE

The purpose of this policy is to establish written policies and procedures concerning ASI Student Organization Fund Accounts. †

POLICY

- I. All officially recognized student organizations are required to maintain an on-campus fund account with Associated Students, Inc.
- II. An individual fund number will be issued upon recognition of the student organization.
 - a. All transactions must include this fund number.

STUDENT ORGANIZATION FUND ACCOUNTS
ACCOUNTS PAYABLE POLICY

- III. Student Organization Fund Accounts consist of those funds held in trust by the Associated Students, Inc., on behalf of officially recognized student organizations.
- IV. Student organization funds are not under the budgetary or programmatic control of Associated Students, Inc.
- V. All student organizations must complete an “~~ASI Funds Administration~~Student Org Officer & Advisor Agreement” (~~Attachment IV~~) each academic year upon recognition by Student Leadership & Involvement Center (SLIC).
- VI. Student Organization Fund Accounts cannot be used to hold funds on behalf of other student organizations. Funds may be held by a student organization on behalf of another, external organization only on a temporary basis in conjunction with a fundraising event where a check for the proceeds will be issued to the outside organization.

PROCEDURE

I. Expenditures

1. See Student Organizations Account Services Guidebook on ASI website for expenditures processes.

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2. An ASI Expenditure Request Form (ERF) must be completed to receive reimbursement or to process payment.

- a) CSUSM Sponsored Student Organization ERF requires the signature of the Student Organization President, Treasurer, and Faculty/Staff Advisor.
 - i. All student organizations that fall under the supervision of Campus Recreation require additional signature approval from designated Campus Recreation staff member.
 - ii. See ASI Accounts Payable policy for reimbursement processes and procedures.
- b) Student organizations with negative balances will not be able to process reimbursements until there are sufficient funds in their account.
 - i. Prior to approving the expenditure, the ASI Professional Staff Designee will check PeopleSoft for the availability of student organization funds. If sufficient funds are not available, the ASI Professional Staff Designee will not grant approval of the expenditure.

~~e) Fund account balances are available upon request.~~

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II. Deposits

1. Student Organization Fund Account deposits are to be completed at the University Cashier’s Office.

2. See Student Organizations Account Services Guidebook on ASI website.

III. Inactive Student Organizations

- 1. In the event that an organization does not wish to be recognized the following year, or they have prior knowledge that they will not meet the university’s recognition requirements, the current student organization officers may identify a

specific organization or campus entity where they would like to redistribute their funds. This process must be conducted during the student organization recognition period for that current academic year.

2. Funds in inactive Student Organization Fund Accounts may be maintained or swept, depending on recognition status of the student organization for the past academic year.
 - a) A student organization that has been recognized by SLIC for the past academic year but whose Student Organization Fund Account has not been active during this period may maintain its account balance with no penalty.
 - b) A student organization that has not been recognized by SLIC for at least two academic years and whose fund account has not been active during this period, will have its balance, if any, swept after July 1st of the next fiscal year.
 - i. The funds swept from identified inactive student organizations will be transferred into an account used for ASI Leadership Funding.
 - ii. SLIC will oversee leadership academy process that will allow for student organizations to receive additional funding through ASI Leadership Funding based on attendance at mandatory SLIC leadership training sessions.

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RELATED DOCUMENTS

- I. ASI Expenditure Request Form (ERF)
https://www.csusm.edu/asi/documents/forms/asi_expenditure_request_form_erf.pdf
- ~~II. CSUSM Accounts Payable Training~~
~~https://www.csusm.edu/fs/ap/apdocs/ap_training_manual_9.2.pdf~~
- ~~III. II. Payee Data Record~~
~~<https://adobesigndynamicworkflow.csusm.edu/ap>~~
- ~~IV. III. CSUSM Accounts Payable Department~~
~~<https://www.csusm.edu/fs/ap/index.html>~~
- ~~IV. Chancellor's Office - Administration of Student Organization Funds - ICSUAM Policy Number 3141.01: <http://www.calstate.edu/icsuam/sections.shtml>~~
- ~~V. Chancellor's Office - Student Activities - Executive Order 1068: <http://www.calstate.edu/co/EO-1068.html>~~
- ~~VI. ASI Funds Administration Agreement Student Officer & Advisor Agreement~~
~~<https://csusm.presence.io/form/student-org-officer-advisor-agreement-2023-2024>~~
- ~~VII. ASI Accounts Payable policy~~
~~https://www.csusm.edu/asi/documents/about/asi_accountspayable_approved11.5.21.pdf~~
- ~~VIII. Student Organizations Account Services Guidebook~~
~~https://www.csusm.edu/asi/services/2122_studentorg_accountservice_guidebook.pdf~~

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STUDENT ORGANIZATION FUND ACCOUNTS ACCOUNTS PAYABLE POLICY

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