Chapter 1

Introduction

Background Information

The Associated Students, Incorporated (ASI) Board of Directors is one of three branches in ASI Student Government along with the University Union Advisory Board (UUAB) and the ASI Executive Cabinet. The Board is the official voice of Cal Poly students and is responsible for the efficient operation of ASI and its corporate responsibilities (ASI Bylaws, 2010).

The ASI President, Chair of Board and Chair of UUAB serve as corporate officers of ASI. The ASI Chief of Staff, Vice Chair of the Board, and Vice Chair of UUAB served on the officer team but have no corporate duties. The officers formulate goals for the year, plan specific events, and individually are responsible for the effective management of their branch.

Any student in good academic standing with Cal Poly and is enrolled as a full time Cal Poly student can run and serve on the Board. When a student runs for the Board, they run based on their Academic College and campaign only towards the students in that college. Elections and campaigning occur throughout Spring Quarter. Elected Board members serve from June 15th to June 15th of the next year.

At the beginning of Fall Quarter, usually during the first weekend in October, the officers plan a training weekend event for all Student Government members called “Fall Kickoff.” There is a “Winter Kickoff” at the beginning of January to review the yearly objectives, decide quarterly goals, and re-examine each branch’s progress. Currently,
each year’s officer team plans both of these events from beginning to end, rarely referring to past Kickoffs.

The Kickoffs are crucial for each year’s success. Fall Kickoff, in particular, is the main training time the officers have with the entire Student Government team. The officer team sometimes struggles to effectively manage the time and assist the Student Government members in retaining all of the information (*Vaccaro*, 2006).

**Statement of Problem**

ASI Student Government has no written documentation on past Kickoffs with the exception of past officers “End of the Year Reports”. Each officer writes a report that reviews their year in office and makes recommendations to the next year’s officer. These reports do not focus on the Kickoffs in great detail.

There is nothing in place that tracks what information should be presented, what icebreakers have been effective, and what activities have been used in the past. Each year, the officer team creates these events and has few historical documents to refer to (*Vaccaro*, 2010).

The officers decide the timing of the events, whether they should be one full day or dispersed over two days. A breakout session for each of the branches has occurred in each of the last four years set of Kickoffs, but these sessions are approximately only an hour in length. For the purpose of this report, an orientation program will be established for the Board of Directors’ breakout session at Fall Kickoff (*Vaccaro*, 2010).
Importance

The ASI Board of Directors has corporate oversight of ASI as a corporation. This means that if the Board is not adequately trained and educated on the internal operations of ASI, they will not know how to make corporate decisions properly throughout their term. Board members only serve for one year unless reelected. This means that there are many historical enactments previous Boards have made that directly effect what the current Board can do. If the Board doesn’t know the history, the structure, and the purpose of their role, they cannot successfully serve the students and serve the corporation.

Purpose

The purpose of this project is to create an effective orientation that an ASI Board of Director must complete at the beginning of their term in office. This orientation program will better prepare Board members for their terms and educate them on history of ASI and the Board. Educated Board members make decisions in the best interest of Cal Poly students and of ASI. This project will give options to the officer team, namely the Chair of Board, of how to deliver different topics. It is important for the officers to be creative with Fall Kickoff, but also be consistent with the content of the program.

Objectives

This project will focus on accomplishing the following objectives:

- Create an effective orientation program that an ASI Board of Director must complete at the beginning of their term.
• Determine what the Board must know to effectively begin their terms. What needs to be known first? What can be implemented through the course of the year?

• Implement a time efficient program. Determine how much time is needed to present the material.

• Make the Kickoff an enjoyable process and incorporate social time.

• Research and decide on an effective method for how to have this orientation program carry over year after year.

Definition of Terms

• 501(c)(3) Non Profit Organization: ASI is a 501©(3) tax exempt, non profit, public benefit corporation and must abide by any provisions set forth by the state of California.

• ASI: Associated Students, Incorporated is a 501©(3) Non-Profit Organization and a student run auxiliary organization that follows California Education Code Title V. For efficiency in this project, it will be referred to as “ASI.”

• ASI Board of Directors: The ASI Board of Directors is the official voice of Cal Poly Students and serves as the corporate oversight of ASI. It consists of 25 Board members from each of the six Academic Colleges. This entity is commonly referred to as the “Board.”

• ASI Children’s Center: In 1993, a student referendum passed and allowed funds to be allocated to the building of a Children’s Center. The Paul Orfalea family generously donated funding and the Center now carries the family’s name. The
Children’s Center provides child care to Cal Poly students and families of the San Luis Obispo Community.

- ASI Chumash Challenge: The ASI Chumash Challenge is a site of Cal Poly that is set up to include a ropes course and multiple leadership building activities for any Cal Poly Students to partake in.

- ASI Epicenter: The ASI Epicenter is an office within the second floor of the University Union that houses Club Services, ASI Events, Marketing, and Public Relations.

- ASI Programs: ASI Programs can be defined as the services, events, and opportunities that ASI provides. These include facilities, ASI Events, Rose Float, Club Services, Business Services, Craft Center, Poly Escapes, Intramurals etc.

- Budget Committee: The Budget Committee is one of the six corporate subcommittees of the ASI Board of Directors that makes funding recommendations to the Board. This committee presents the annual ASI Budget to the Board for approval. This committee only handles ASI funds and not University Union funds and is chaired by the Vice Chair of the Board.

- Board of Directors Meeting: The Board of Directors meets every other Wednesday from 5PM-8PM to take action on many issues and corporate agenda items. The meetings are a time for different campus entities and the officers of the ASI Corporation to give reports and updates.
Board of Directors Workshop: The Board of Directors meets every Monday night from 5PM-7PM to discuss upcoming issues, provide announcements and reminders, and to train in multiple leadership areas.

Branch: Throughout this report, “branch” will refer to one of the three branches, or sectors, of ASI Student Government. The branches are the ASI Board of Directors, ASI Executive Cabinet, and the University Union Advisory Board.

Bylaws and Policy Review Committee: The Bylaws and Policy Review Committee is one of the six corporate subcommittees of the Board. This committee writes and reviews legislation, and presents Bylaw and Policy recommendations to the Board.

Club Funding Liaison: The ASI Club Funding Liaison is a member of the Board who approves ASI Club Funding applications and makes recommendations to the Board about Club Funding. The liaison works with both ASI Staff and the Board. Clubs can file for $500 Club Sponsorship money or $2,000 Event Co-Sponsorship money. Clubs are not eligible to receive money from both categories.

CSSA: The California State Student Association is an organization comprised of each of the 23 CSU campuses. This is the official, recognized voice of the CSU students.

CSU: The California State University System has 23 campuses in California including Cal Poly. The CSU Chancellor and CSU Board of Trustees oversee the management of the CSU System.
- **Elections Committee:** The ASI Elections committee is one of the corporate subcommittees of the Board. This committee conducts elections for each Board position and for the ASI President. This committee adjusts position qualifications and reviews election policy.

- **Executive Cabinet:** The Executive Cabinet serves underneath the ASI President and ASI Chief of Staff and is one of the three branches of ASI Student Government. This group is meant to accomplish the goals of the President and can have no more than nine members. Members apply and are appointed to serve on the Executive Cabinet by the ASI President and ASI Chief of Staff.

- **Intramural Sports:** Intramurals provide structured leagues and sport games for any student at Cal Poly to get involved in.

- **Internal Review Committee:** The Internal Review Committee is one of the six subcommittees of the Board that oversees the structure of ASI Club Funding and reevaluates the internal infrastructure of ASI and UU programs.

- **Personnel Committee:** The Personnel Committee is one of the six corporate subcommittees of the Board. This committee oversees all personnel matters and makes recommendations to the Board about employment changes and Human Resource changes.

- **Student Government Support Team:** This group is made up of the Director of Children’s Programs, Coordinator of ASI Programs, Assistant to the Executive Director, Student Government Administrative Assistant, and the Assistant
Director to Programs. Their main purpose is the assist Student Government in advancing in areas such as orientations and personal development.

- **Title V**: Title V is a part of California Code that covers Education. ASI must abide by Title V provisions for California State Universities (CSU) and legislation enactments by the CSU Chancellor or CSU Board of Trustees.

- **UUAB**: UUAB is an acronym for the University Union Advisory Board which oversees the operation for four of the five ASI managed facilities (i.e. Chumash Challenge, Sports Complex, University Union, and Recreation Center) and is one of the three branches of ASI Student Government. This group is advisory to the University President and is comprised of one student representative from each of the six Academic Colleges. An ASI President’s Designee and a Board of Directors Representative also sit on this Board. The Chair of UUAB applies and is elected by last year’s UUAB and serves as the Secretary and Treasurer of ASI.

- **ASI Sports Complex**: The ASI Sports Complex includes basketball courts and turf fields located near the Cal Poly baseball fields that any students can access and exercise on.

**Summary**

The ASI Board of Directors is one of the three branches of ASI Student Government. The ASI Board of Directors holds many responsibilities as the main corporate authority and as the main liaisons between the students and the corporation. For over a decade, the ASI officers have planned and executed a Fall Kickoff and Winter Kickoff to educate the Student Government members and hold them accountable to
their quarterly and yearly goals. Fall Kickoff is the main training time for all of Student Government.

There is hardly any documentation on past Kickoffs and what was effective about these Kickoffs. Each year’s officers plan Kickoffs that may repeat some of the least effective material from previous Kickoffs.

If Board members are not adequately trained, the success of that year may be in jeopardy. The purpose of this project is to create an orientation program that an ASI Board of Director must complete at the beginning of their term in office.
Chapter 2

Review of Literature

What is ASI?

Associated Students, Incorporated was established in 1963 on the California Polytechnic State University campus in San Luis Obispo, California. The purpose of this organization is to provide the students of Cal Poly specific services. The ASI Mission statement is “ASI will be every student’s connection to the ultimate college experience.” ASI provides services such as Student Government leadership opportunities, Business Services, Club Services, and Recreation Services (Johnson, 2010).

In ASI Student Government, there are three branches and three corporate officers. The ASI President serves as the Chief Executive Officer of ASI and appoints a Chief of Staff who assists the President in running the Executive Cabinet. The Executive Cabinet can have no more than nine members and their main objective is to execute the goals of the ASI President. The ASI President is the only student elected by the student body whereas the Chief of Staff and the Executive Cabinet go through an interview process and are appointed (ASI Bylaws, 2010).

The University Union Advisory Board (UUAB) oversees four of the five ASI managed facilities. The five facilities are the Recreation Center, the University Union, the Chumash Challenge, the Sports Complex and the Children’s Center. The Children’s Center is under the management of the Board of Directors due to state mandate. The UUAB consists of a UUAB Chair, one representative from each of the six Academic Colleges, an ASI President’s designee, and a Board of Directors representative. The
Chair of UUAB serves as both the Secretary and Treasurer of ASI. This Board is advisory to the University President and makes policy recommendations to the President for how to manage these facilities effectively (University Union Advisory Board Operation Code, 2010).

The ASI Board of Directors serves as the official voice of Cal Poly students and has managerial and fiscal corporate oversight. There are 25 Board members representing the six Academic Colleges on campus. Every year after the fifth week of Winter Quarter, ASI determines based on College population how many Board members there will be per college on next year’s Board. Colleges can have no less than two and no more than five representatives. The Chair of the ASI Board of Directors must be elected to the Board and then is nominated and elected by the past year’s Board. The Chair of the Board manages the effective operation of the Board and its subcommittees (ASI Bylaws, 2010).

The ASI Board of Directors has six subcommittees that oversee the internal operations of ASI. These are Budget, Bylaws and Policy Review, Co-Sponsorship, Elections, Internal Review, and Personnel. The Board meets every Monday and every other Wednesday (ASI Bylaws, 2010).

There is an Executive Director of ASI and three subordinate who are in charge of the three different sectors of ASI. The Director of Business Services oversees services such as frontline student assistants, accounting, information technology, and human resources. The Director of ASI Programs oversees such programs as ASI Events, Club Services, Aquatics, Fitness Programs, Intramurals, Marketing, the Craft Center, Poly
Escapes, and Rose Float. Poly Escapes schedules trips for students to sign up for that include hiking, snowboarding, outdoor adventures, etc. The ASI Rose Float participates in the annual Rose Parade in Pasadena, California that occurs every New Years Day. Lastly, The Director of ASI Children’s Programs oversees the ASI Children’s Center and its daily operations. Currently, ASI employs approximately 500 people and manages a 12 million dollar budget (*Johnson*, 2010).

**ASI Structure**

Figure 2.1 shows the primary structure of the ASI leadership. All other employees including full time and student employees fall under one of the three program areas.

![ASI Organizational Structure](image)

Figure 2.1. ASI Organizational Structure (*Johnson*, 2010).

**Parliamentary Procedure**

The ASI Board of Directors uses Parliamentary Procedure and Robert’s Rules of Order to run their meetings efficiently. These procedures are very extensive and the Board only uses a portion of the motions and rules during a year’s time. Figure 2.2
shows the most commonly used motions and what vote they must receive in order to pass (ASI Bylaws, 2010). A lesson in Parli-Pro does not have to be included in Fall Kickoff. Learning it will take time and must be practiced in the Board room or at a workshop.

<table>
<thead>
<tr>
<th>Motion</th>
<th>Wording</th>
<th>Second?</th>
<th>Debate?</th>
<th>Amended?</th>
<th>Vote Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Motion</td>
<td>&quot;I move that...&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>Amend a Motion</td>
<td>&quot;I move to amend the motion by...&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>End Debate and Amendments</td>
<td>&quot;I move the previous question.&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3rds</td>
</tr>
<tr>
<td>Refer the Matter to Committee</td>
<td>&quot;I move to refer the matter to committee..&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>Protest Breach of Rules or Conduct</td>
<td>&quot;I rise to a point of order&quot;</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No vote</td>
</tr>
<tr>
<td>Suspend Rules Temporarily</td>
<td>&quot;I move to suspend the rules so that...&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3rds</td>
</tr>
<tr>
<td>Verify a Voice Vote</td>
<td>&quot;I call for a division,&quot; or &quot;Division!&quot;</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No vote</td>
</tr>
<tr>
<td>Request Information</td>
<td>&quot;Point of information&quot;</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No vote</td>
</tr>
<tr>
<td>Accepting an Audit</td>
<td>&quot;I move to approve the audit...&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>2/3rds</td>
</tr>
<tr>
<td>Passing a Budget</td>
<td>&quot;I move to approve the budget...&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
</tbody>
</table>

Figure 2.2 Parliamentary Procedure for an ASI Board Member (Robert’s Rules of Order, 2000).

501 ©3 Non Profit Corporations and Title V
Cal Poly Associated Students, Incorporated is a 501©3 Nonprofit Public Benefit Corporation and as a higher education student run auxiliary organization, falls under California Code Title V. ASI must abide by Executive Orders and decisions enacted by the Chancellor and the California State University Board of Trustees (California Code of Regulations, 2010).

Orientation Effectiveness
In an interview, Johnson stated, “A set orientation process is critical to the success of each year’s Board of Directors.” Currently, there is no set process on how to train incoming Board members. Since 2008, ASI staff has put together an “ASI 101” that is a two-hour event at the end of May for incoming Board members to attend. ASI 101
includes a PowerPoint presentation with information on the ASI structure, the ASI managed facilities, and what each branch of Student Government does (Johnson, 2010).

Every year, ASI Student Government puts together a Fall Kickoff that takes place approximately the second weekend of October. This two day event is the main training time the Chair of Board has with the Board of Directors. Additionally, approximately two hours of this training is allocated for Branch breakout and training time.

The 2005-2006 Chair of Board, Joe Vaccaro, shared his concerns with the training program in his End of the Year Report,

“Every year ASI talks about how it takes a quarter to get things moving. In my opinion this is caused the amount of knowledge that new members of ASI are tasked to grasp in a weekend. Coupled with this is Fall Kick-off doesn’t take place until October. I would strongly recommend that ASI as an organization look into a sophisticated process for training and educating new ASI Leaders through the summer. This would enhance ASI’s ability to be effective from the start of Fall quarter. If a standardized, self-lead process were developed this would also greatly aid when new leaders come to the organization mid-year.”

Vaccaro’s concerns are also shared with the California State Student Association Executive Director, Miles Nevin. Nevin stated in an interview, “Training and transition of board members is one of the often forgotten elements of student leadership, resulting in ineffectiveness and a lack of continuity.” Based on this research, a set orientation process for the Cal Poly ASI Board of Directors is needed for efficiency and a higher level of achievement.
**What do Other ASI’s do for Orientation?**

In an interview with Emel Shaikh, Chair of the ASI Board of Directors at California State University Fullerton, said that two to three training sessions are held for their 18 member Board between fall and winter. During these orientations, the Board members learn about the following items: roles and responsibilities of ASI, ASI governmental structure, committee information, budget information, Parliamentary Procedure, ASI bylaws and policies, and overview of the Board meetings.

Shaikh stated that the trainings usually begin with icebreakers so that the group gets to know each other better. For example, they’ve completed the rock wall located in their recreation center. To keep the group focused, the training moved around on campus from their Arboretum to their Children’s Center. At the end of their training, they hold a mock Board meeting where they go through potential Board agenda items such as passing the budget and accepting the yearly audit.

Nevin stated that many Associated Students do not have an orientation plan that can be transitioned and updated year after year. Johnson also clarified that Cal Poly’s ASI Student Government is structured much differently than other CSU’s and that much more corporate information would need to be included at Cal Poly.
Chapter 3
Methods and Materials

Methods

Much of the knowledge and research of the history of ASI, its current structure and operations come from the author’s previous position on the ASI Board of Directors and as Chair of the ASI Board of Directors. When a similar training program is developed for other student groups in the future, it is crucial to understand the foundation of the organization in order to determine how to structure the training program and what content should be included.

February 9, 2010: Meeting with Dr. Rick Johnson, ASI Executive Director, to seek permission and his guidance on what the ASI Board of Directors needs in the form of a training program. Dr. Johnson stated that the Student Government Support Team is working on a training program all Student Government members will complete before the Fall Kickoff. He suggested that this project create a Fall Kickoff training for the Board members since nothing is set in place for these breakout sessions. Johnson says Fall Quarter always turns into a training quarter when if the training is really effective at the beginning of Fall, the Board can accomplish a lot more before December.

February 23, 2010: A survey was emailed to the Associated Students, Inc. Chair of Board, Emel Shaikh, at California State University, Fullerton to gain insight on how other CSU schools train their incoming Boards. The results of the survey are in Appendix A. This survey assisted by breaking down which subjects need to be covered through training. It provided alternative ideas on when to train, as well.
February 25, 2020: The survey sent to Fullerton was sent to a current Cal Poly ASI Board member, Mitchell Yerxa, to receive an assessment on his experience with the 2009 Fall Kickoff and his experience in Cal Poly’s Week of Welcome orientation program. The results are in Appendix A and really emphasized student interaction and social time.

March 9, 2010: The Student Government Support Team sent their finished ASI Guide to Student Government to the ASI officers for feedback. This guide included a booklet, PowerPoint presentation and a Jeopardy game. All of these materials are in Appendix B. With access to these documents, this project determined what concepts did and did not need to be covered in the Board of Director breakout session during Fall Kickoff.

April 23, 2010: A meeting with Tonya Iversen, Director of ASI Children’s Programs and Support Team Coordinator, occurred to gain direction on what she thought needed to be covered in this project. Iversen is an expert with strategic planning and different methods of presentations. Her insight reinstated the importance of student interaction. Full notes from this meeting can be found in Appendix A.

May 7, 2010: Drafts of the materials were created and the finalized versions are in Appendix C.

October 14, 2010: Surveys and copies of the orientation material were sent out to Michelle Crawford, ASI Events Coordinator; Lorin Torbitt, Chair of the University Union Advisory Board; and Dr. Rick Johnson, Executive Director of ASI.

October 29, 2010: Surveys were collected and the results were compiled and analyzed.

Materials
All of the materials created for this project can be found in Appendix C. These materials should be updated yearly to represent the most current information. The ASI officers may enhance the materials to reflect any other information they wish to provide; these materials are examples of how to present useful information and may be modified.

**Action Item Matrix:** Based on the information provided through past Chairs of the Board via their End of Year Reports, usually a portion of Fall Kickoff is dedicated to educating the Board of the six corporate subcommittees. In order to use the small time period effectively, an Action Item Matrix has been created to outline the main action items that the Board must vote on every year. This will allow for every Board member to know the main role of each committee.

**Committee Interest Forms:** Each Board member will have the opportunity to fill out which subcommittee they would like to serve on at Fall Kickoff. They will have this opportunity after the subcommittees have been discussed and after the Action Item Matrix has been dispersed.

**Event Evaluation:** ASI uses the same event evaluation sheet for every event they put on. It is recommended that each Board member fill out this evaluation at the end of Fall Kickoff and it is scanned and saved to the n drive. This will ensure that the next year’s officer team will have access to these evaluations and use them when determining how to structure Fall Kickoff the next year. After interviewing Iversen, it solidified that consistency between each year’s Fall Kickoff is lacking. It is formally recommended that not only do the Board members fill out the event evaluation, but that each officer is
required to save all of their Fall Kickoff materials to two discs. One disc will stay with an ASI staff member (preferably the Student Government Administrative Assistant) and one disc will be transitioned to next year’s officer. Additionally, it should be required for the officers to include an evaluation of Fall Kickoff in their End of Year Report. The officers can also video tape breakout sessions and should have at least one consistent staff member present during these sessions.

**Flyswatter Game:** The Flyswatter Game is included in the PowerPoint. The rules of the game are simple: two Board members will come up to the screen each with a plastic flyswatter, a question about the different subcommittees is asked, and whoever swats the correct listed answer on the PowerPoint gets the point. The Board members should be split into two teams. Whichever team has the most points at the end of the game wins. Prizes can include a pizza party after a workshop or a $5 gift card to Starbucks. This game is a fun, interactive way for the students to learn about the role of each committee.

**History of each committee:** Supplemental materials were created for each subcommittee with historical legislation and documents, a full committee description, and goals for the year included. This allows for members of a specific committee to become experts on that committee and not try learning the history and role of each one. This will also give the Board members ownership over their committee assignments and take pride in what the committees will be working on through the academic year. These history packets will be dispersed after Fall Kickoff when the committees have full membership. They should be available during the breakout session for the Board
members to look through and reference. To save paper, two examples of the committee packets are in Appendix C. The rest of the committees should include the following information:

**Bylaws:** a copy of the Bylaws and policy manual

**Elections:** a copy of the Elections Committee code and marketing materials from the previous year

**Personnel:** a copy of the Personnel Committee code

**UUAB Representative:** a copy of the UU Operation Code and UUAB annual action item matrix.

**PowerPoint:** An example PowerPoint presentation was created to outline the breakout sessions’ schedule and goals. It will also assist in educating about the subcommittees and past advocacy efforts from the Board.

**Schedule:** An example schedule was created to show how to allocate time throughout the Fall Kickoff training day. The schedule also gives examples of ice breakers and goes into detail on how to approach different topics. The schedule also indicates when to pass out the aforementioned materials.

**Survey:** In order to adequately review this project before implementation, a survey was sent to multiple ASI Staff members including the Chair of the University Union Advisory Board, and ASI Executive Director. The questions in the survey are focused on things such as time management, creativity, and overall effectiveness.
Chapter 4

Results

The author of this project has had significant involvement in Cal Poly’s Associated Students Incorporated. Based on this involvement, if the author were to have returned as an officer of the corporation during the 2010 – 2011 Academic Year, the proposed project could have been fully implemented during the 2010 Fall Kickoff. With a new leadership team, this year’s Fall Kickoff was coordinated with a large amount of ASI staff control and therefore, the proposed project garnered results in an alternative form.

The main objective of this project was to create an effective orientation program that an ASI Board of Director must complete at the beginning of their term. In order to test the program created, three key people were given copies of the proposed orientation and a survey to complete. Dr. Rick Johnson, as the ASI Executive Director, has extensive knowledge of the organization and of the importance of effective orientation. He has witnessed many Fall Kickoffs and can accurately define what needs to be changed. Michelle Crawford is an ASI Events Coordinator and is a part of the Student Government Support Team. Due to her event planning experience, she will provide constructive feedback. Lorin Torbitt has been the Chair of the University Union Advisory Board for two years and since she has experience on an officer team, she can give a student perspective on how to make the training fun and effective.
After compiling the results of the survey, Figure 4.1 showcases the average scores for each category. Overall, the presentation was ranked in the range of “Very Good” and “Excellent.”

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Management</td>
<td>3.5</td>
</tr>
<tr>
<td>Interaction</td>
<td>4</td>
</tr>
<tr>
<td>Creativity</td>
<td>3.75</td>
</tr>
<tr>
<td>Amount of Information</td>
<td>3</td>
</tr>
<tr>
<td>Quality of Information</td>
<td>3.5</td>
</tr>
<tr>
<td>Overall Fun</td>
<td>4</td>
</tr>
<tr>
<td>Overall Effectiveness</td>
<td>3.75</td>
</tr>
</tbody>
</table>

Figure 4.1 ASI Staff Survey Results.

In addition to the numerical scores received, the ASI staff members provided feedback through the orientation packets. The ice breaker examples were well-received and it was suggested that End of Year reports be written by each subcommittee chair and included in the subcommittee packets.

Crawford thought that the training would only be effective if each Board member had already completed the ASI Guide to Student Government and any other training that occur before Kickoff. Although she thought the program was fun, she
pointed out that it is important that each year the content of the program is reviewed. It is crucial for the training to be fun, but the correct information must be displayed.

Although each person surveyed would change the wording of a few things like the questions in the Flyswatter Game, the overall consensus was that this is a great training that would be effective and implemented at the Fall Kickoff of 2011.

The second objective was to determine what the Board must know to effectively begin their terms. What needs to be known first? What can be implemented through the course of the year? By completing thorough research, it was decided that the most important thing Board members must know by the end of Fall Kickoff is the scope of their role in ASI. Because of this, the PowerPoint suggested includes discussion about the corporate and advocacy responsibilities of the Board and quizzes them on the duties of the corporate sub-committees.

It was also decided that subjects such as Parliamentary Procedures can be taught and practiced during workshop time because the Board will learn this throughout the entire year and do not need to be experts at the beginning. Many issues will come up that cannot be determined but as long as the Board understands their role and the effect it can have on the campus, other subjects can be addressed throughout the year.

The third objective was to implement a time efficient program and to determine how much time is needed to present the material. The schedule created allocated more time than is probably needed so that no topic is rushed. The schedule was formed around an hour and a half segment so that even when time is of the essence, an effective program can be completed.
The fourth objective was to make the Kickoff an enjoyable process and incorporate social time. This objective was met by providing icebreaker options and the flyswatter game. These events will give the Board members time to meet each other and will take pressure off the Chair to keep all members entertained during the breakout.

Lastly, the fifth objective was to research and decide on an effective method for how to have this orientation program carry over year after year. In the proposed program, it was suggested to maintain all event evaluations completed by Board members and to have the Chair of the Board save all materials to two discs. One disc will be passed on to the next Chair of the Board and one disc will stay with a consistent staff member. After reviewing the surveys, a common suggestion was instead of scanning each event evaluation; the main information from the evaluations should be compiled into one document.

Summary

Overall, all objectives set out at the beginning of the project were addressed. In the future, as the project is implemented, feedback should be continually received and reviewed so that the program can improve as new Boards complete it.
Chapter 5

Conclusion and Recommendations

Conclusion

Based on the survey results conducted and on the various experiences the author of this project has had, it is concluded that training created is ready for implementation. Although the staff members surveyed provided valuable feedback, the training program proposed would have benefited from being implemented during this year’s Fall Kickoff. Changes might have to be made in the future as the program is implemented, tested, and as changes in ASI are made.

Recommendations

It is fully recommended that this training program is utilized by ASI leaders in the future and that elements of the program can be modified and used by various student groups and clubs. It is understood that if the program can be improved, that changes should be made and that each leader implementing the program incorporates their ideas and may add or modify any information. By compiling all of the event evaluations into one document and adding more items to the subcommittee packets, the efficiency of this project is increased as well as its sustainability. It is recommended that the program is reviewed each year by the ASI Executive Director, the Support Team, and the current and incoming Chairs of the Board. The purpose of this project was to create an effective training program for an ASI Board member, but to overall enhance the importance of training and to make progressive steps to ensuring the success of future ASI Boards.
Works Cited

1. (R. Johnson, personal communication, February 16, 2010).

2. (M. Nevin, personal communication, February 23, 2010).

3. (E. Shaikh personal communication, February 25, 2010).

4. (M. Yerxa, personal communication, February 26, 2010).


Appendix A
Emel Shaikh

Questions Asked:

- How do you train your incoming student government leaders?
- What is the main information included in this training program?
- What types of activities are included in the training (i.e. icebreakers, games, campus tours, etc.)
- What is effective in your training program?
- What would you include next year if you could coordinate another training program?

Response: Cal State Fullerton has 8 academic colleges. The way the Board of Directors is set up is allows there to be two representatives from each academic college, creating a total of 16 student leaders. This is the actual Board itself. In addition to student reps, we have one designee from Academic Senate, and one University President's designee, which for many years has been our Dean of Students. These 18 people make up the voting members of the Board of Directors.

In addition to these members, we have all of our ASI Executive Staff (so Juli, Joe + our marketing, administration and governmental affairs people) sit on the Board for their input. Lastly, we have our ASI Executive Director sit on the Board.

For training purposes, we focus training primarily on the student representatives. Our Executive Director helps with trainings and retreats because of the nature of his job, but all of the Exec Staff has their own, separate retreat/training and the faculty/staff members obviously do not need to be trained.

Additionally, the make up of the Board is such that each representative serves a staggered one-year term. We have elections every semester to allow this to happen. So, for example, if Adam runs in the election in the Fall to represent the College of Business, he will serve the Spring-Fall year term. If Brittany runs in the election in the Spring to represent the College of Business, she will serve the Fall-Spring term. This way, Adam and Brittany will work together one semester, and the next successor will serve with Brittany after Adam's term ends. This allows for easier transition with the new members.

How do you train your incoming student government leaders?
We hold two-three training sessions for the incoming student leaders. Usually, there will be two training sessions held in the summer, and one in the winter. The nature of these will vary depending on the Chair of the Board of Directors and often the Vice Chair (both elected through the Board itself, and they are both already on the board therefore representatives of a college). In the past, we have had sessions that were held off campus at locations such as ropes courses, or on campus within the student union.
Some sessions are single day trainings, some are over two days. We do not have overnight retreats, mostly because it would be too expensive for the nature of our Board. This year, while I have been chair, the most successful retreat took place over a full day and a half day session held in the winter.

What is the main information included in this training program?

The information that we focus on for the retreat includes:

Roles and responsibilities

ASI governmental structure

Committee information (all members are required to sit on one ASI Committee)

Budget information (focus on the Spring when the broader budget process begins)

Parliamentary Procedure

ASI bylaws and policies

Overview of meetings

What types of activities are included in the training (i.e. icebreakers, games, campus tours, etc.)

We usually start trainings with icebreakers. One thing that worked really well this year was conducting a presentation (please see attached) to get to know everyone. We also do team building activities. Going off of the example of this year’s retreat, we started the retreat off (after icebreakers/introductions) with rock climbing. We have a rock wall in our recreation center, and we were able to rent it out for about 2 hours at the beginning of the day. The board was not informed of this beforehand, which definately helped because everyone wanted to try it out. Even the people who were afraid of heights still gave it a shot. This activity really allowed everyone to mingle and talk and encourage one another. The 2 hours allowed people to be comfortable enough to go and try new routes etc.

Another thing we tried out was moving locations throughout the day. We started off at the recreation center, then moved on to the Arboretum/park that ASI funds on campus, then moved to our Children's Center, and finally ended the day in the dorms. Moving to different locations throughout the day allowed students to see the campus and experience the different parts of it that they might not have explored on their own.
One new thing we tried out was going to dinner. We have sufficient funds in our training budget to provide for food, so we all went to an Italian restaurant at the end of the first day. This, again, allowed everyone to socialize and get to know one another.

Lastly, we hold mock meetings to give everyone a chance to kinda see what a regular meeting looks like prior to actually being in one. This allows everyone to go slow and make mistakes.

What is effective in your training program?

Trainings, from my experience, are a hit/miss, and depend in a large part to the personalities of the newcomers. The one thing that was HUGELY successful was our Parliamentary Procedures training. We used food as the training. I am attaching the document I used to conduct this meeting. This really allowed people to be comfortable in talking and not be afraid to make mistakes. And in the end, everyone had a snack! This was so successful that 3 or 4 other groups asked me if they could use this training for their group or if I could come in and conduct this workshop for their group.

Other than that, I think simply being prepared and having a good mix between informational training and team building allows people to learn.

What would you include next year if you could coordinate another training program?

I think that the basic information for our trainings is sufficient. There is a LOT of information but you dont really understand the depths of it until you begin to experience it. However, the parliamentary procedures workshop would definetly be included again, as would the rock wall session. Additionally, if possible, create legacy binders for each representative (in our case, each college has one binder with key information regarding contacts, clubs included, the academic council and its policies, etc. Include also basic information for the representative so that they have something to refer to instead of constantly asking the same person questions).

If you would like, feel free to take a look at the main presentation we do for our retreat that goes over the ASI structure on our campus. You can find this information at: http://asi.fullerton.edu/asigovernance/boardofdirectors.asp.
Mitchell Yerxa

Interview Notes:

1. What type of orientation or training process did you go through when you first became a WOW leader?

As an orientation leader for freshmen, I attended weekly three hour training sessions in Spring Quarter. The training was very intensive and interactive; helping us get to know other WOW leaders, the city of San Luis Obispo, different leadership activities, and icebreakers.

2. What was effective about this training?

Since it was so interactive, it was fun and didn’t feel like we were learning so much so easily.

3. What do you think could be improved with this training?

The long training sessions are tiring; there may be a way to improve the time efficiency of different sessions.

4. What would you like to see differently in the orientation process of being an ASI Board of Director?

More interaction and the officers putting on the event should prepare more beforehand. They have a short time to prepare but when they don’t know what to do, it easily becomes boring and unprofessional.

5. What do you think was effective with the orientation process in ASI?

The officers did a good job with how much information needs to be presented. There was a lot of social time which was great!
Tonya Iversen

Interview Notes:

1. What do you think could be improved about Fall Kickoff?

   Consistency. It changes every year and every year, the officers have to start from scratch.

2. Why has it been successful in the past?

   Experience on the Board is always helpful because that means the students have been through past Fall Kickoffs and have seen it from the Board members’ perspective. When officers work together, they are clear on the goals for Fall Kickoff and work together on accomplishing their goals.

3. Do you have any suggestions on how to present difficult or boring topics?

   Icebreakers are effective when they are quick. Playing games with the students helps get them up and moving around. Also, when there are topics that are somewhat tedious or difficult to explain, I suggest discussing it first so their attention is still fully on the officer.

4. How do you think Fall Kickoff can be made more consistent year after year?

   Using event evaluation forms from the Board members. We can save these on the n drive and can review them each year. Officers need to keep all of their Fall Kickoff materials and should be required to discuss it in their end of year reports and while transitioning the next year’s officer.
Appendix B
Congratulations, on becoming a part of the ASI Student Government Team! You will notice right away that while the atmosphere appears casual and fun, we do have high expectations of your participation. It is our belief that happy, motivated Student Government members are most successful in advocating on behalf of Cal Poly students.

Student Government members are given a great deal of autonomy and the opportunity to take ownership of their positions and roles within ASI. In an effort to expand global knowledge of ASI Student Government, this training incorporates information regarding ASI programs and services, ASI managed facilities, ASI fee structure, and the roles of ASI staff.

We are glad that you are here; let's get started!
ASI Mission Statement

The mission of Associated Students, Inc. is to enrich the quality of student life and to complement the educational mission of Cal Poly through shared governance, student employment, student advocacy and a broad spectrum of programming, services and opportunities for leadership and social interaction.

ASI Vision Statement

"ASI will be every student's connection to the ultimate college experience."

ASI Basics

- ASI is a non-profit 501(c)(3) public benefit corporation and auxiliary organization.
- ASI operates under the authority of the State of California and the CSU Board of Trustees.
- CSU auxiliary organizations are subject to specific statutes, regulations and policies of the State, the Board of Trustees and the University, specifically:
  - California Government, Corporation and Education Codes
  - Title 5 of the California Code of Regulations
  - Standing Orders of the CSU Trustees
  - Trustee Resolutions
  - Executive Orders of the CSU Chancellor
  - Procedural letters and memoranda of the Chancellor's Office
  - Campus policies and regulations

ASI Purpose and Objectives

- To provide for student self-governance
- To provide authorized programs and services as a student body organization
- To provide authorized programs and services as a Student Union
Role of ASI Management (Directors)

- Refine the “What”
- Decide on the “How”
- Set organizational priorities
- Drive strategic planning
- Supervise professional staff
- Use assessment information for program/service refinement
- Manage organizational resources

Branches of Student Government

Board of Directors
- The official voice of Cal Poly students
- Approves ASI policies and annual budget ($4.1 million)
- Accepts annual audit of ASI’s books and records
- Manages ASI Elections through the Elections Committee
- Suggests guidelines for student organizations and activities
- Advocates on behalf of the students
- Members attend weekly workshops and bi-weekly BOD meetings
- Members serve on Academic Senate and University-wide committees

Board of Directors - Standing Committees
- Bylaws and Policy Review
- Budget
- Elections
- Internal Review
- Personnel
- Co-Sponsorship Liaison

Executive Cabinet
- Carries out the goals of the ASI President under the direction of the Chief of Staff
- Reaches out to students to determine their wants and needs
- Advocates on behalf of the students of Cal Poly
- Focuses the efforts of Lobby Corps
- Members serve on University-wide committees
• Members attend weekly Executive Cabinet meetings

**University Union Advisory Board**
• Reviews and recommends action regarding use of Student Body Center fee
• Reviews and recommends approval of the annual UU budget ($5.4 million)
• Reviews fiscal & operational UU policies
• Reviews commercial subleases and recommends action
• Members serve on University-wide committees
• Members attend bi-weekly UUAB meetings

**The Recreation Center, University Union, and Sports Complex are under the prevue of UUAB**

**Fee Structure**

ASI is funded by student fees that were approved through various student referenda and operates from two distinct budgets:

**ASI: Student Body Organization Fee = $89.43 per quarter**

**University Union: Student Body Center Fee = $128.85 per quarter**

**A portion of the ASI Fee goes to Athletic Scholarships and Student Community Services.**

**Funded by ASI Fees**

• Club Funding
• Club Services & Programs
• ASI Children’s Programs
• Poly Escapes
• Chumash Challenge
• Rose Float (state funded through annual contract)
• Student Referendum Supported
  • Athletic Scholarships
  • Student Community Services

• Administration
  • Student Government
  • ASI President’s Office
  • Board of Directors
- Executive Cabinet
- College Councils

**Funded by UU Fees**

- UU Programs & Services
  - Craft Center
  - Audio-Visual
  - Information Desk
  - Reservations
  - Union Facility Operations
  - Custodial
  - Maintenance
  - Utilities
  - Commercial Lease Spaces

- Recreational Sports Programs
  - Intramural Sports & Tournaments
  - Open Recreation
  - Aquatics
  - Personal Training
  - Informal Fitness
  - Sports Complex
  - Recreation Center Operations

- Administration
  - University Union Advisory Board

**Funded by ASI and UU Fees**

- ASI/UU Events
- Accounting
- Administrative Support
- Assessment & Planning
- Budgeting & Forecasting
- Contract & Lease Management
- Gift & Donation Processing
- Graphics
- Human Resources
- Information Technology
- Marketing
- Payroll
- Project Management
- Public Relations
- Purchasing
- Risk Management & Insurance
- ASI Website
Roles of Student Government and Staff

- The Board of Directors determines __________ they want to accomplish.
- Staff is responsible for __________ to implement.

Policy

ASI Board of Directors:
- Reviews & makes ________________
- Sends ________________ to subcommittees for analysis.
- Approves all new ASI ________________ & changes.

BOD Subcommittee: Bylaws and Policy Review
- Researches and ________________ issues.
- Recommends ________________ to Board of Directors.

UUAB:
- Reviews/proposes/recommends ________________ for UU fee funded programs & facilities.
- Makes ________________ to ASI Executive Director & University President.

ASI President & Executive Cabinet:
- Steer/redirect ________________ or issues to BOD/UUAB.

Staff:
- Identify the need for new ________________ or revision of existing policy.
- Provide ________________ and background.
- Implement ________________ changes.
Programs

ASI Board of Directors:
- Approves all _______ ASI programs.
- Reviews program ____________________.
- Provides ____________ program direction to staff.
- ____________ program input/feedback/proposals from staff and students.

BOD Subcommittees:
- Recommend ______________ for programs, staff, funding, etc.

UUAB:
- ____________ program input/feedback/proposals from staff and students.
- Makes ______________ to ASI Executive Director and University President.

ASI President & Executive Cabinet:
- ____________ programs consistent with goals of ASI President and Chief of Staff.

Staff:
- Initiate, ____________, and implement programs.
- ________________ and report ongoing assessment of all programs and services.
- Update ______________/____________ on program progress.

Fiscal

ASI Board of Directors:
- Reviews and ____________ annual ASI budget.
BOD Subcommittee: Budget
• Reviews and ________________ ASI Budget for approval based on fiscal conditions.

UUAB:
• Reviews and recommends ______________ of annual UUAB budget based on fiscal conditions.

ASI President & Executive Cabinet:
• ______________ funds within annual Student Government budget.

Staff:
• Develop ______________ based on area action plans & ASI Strategic Plan.
• Monitor area annual ______________ and day to day fiscal management.

Personnel

ASI Board of Directors:
• ______________ and ______________ human resources related policies, actions and resources as recommended by Personnel Committee.

BOD Subcommittee: Personnel
• In ______________ with the Executive Director, recommends personnel actions.
• ________________ positions, compensation and benefit changes to the BOD.

UUAB:
• ______________ on Personnel Committee.

Staff:
• Hire and ____________ student and professional
personnel.
- VP Student Affairs (in consultation with ASI President and Chair of the Board) _____________ and ____________ Executive Director.

Governance

ASI Board of Directors:
- Establishes bi-weekly ________ and ________ standing rules.
- Enforces ____________.
- Works closely with ASI President, college councils and students at large to identify ________ for discussion, debate, and action.

BOD Subcommittees:
- Abide by the ____________ rules and subcommittee operational codes.

UUAB:
- ________ to ASI Executive Director and University President.
- Abides by the UUAB ____________ Code (authorized by ASI Bylaws).

ASI President & Executive Cabinet:
- ________ by position descriptions developed annually by ASI President and Chief of Staff.

Staff:
- Provide ongoing ____________ and development.
- Provide information to ____________ informed policy and decision making.
- Maintain ____________ archives.
Planning

ASI Board of Directors:
- Participates in revising ____________ planning objectives annually.

BOD Subcommittees:
- Participate in planning and project ____________ as assigned by the Chair of the Board.

UUAB:
- Participates in planning and ______ setting related to ASI President and officers’ goals.

ASI President & Executive Cabinet:
- Participate in planning and goal setting related to ASI President and officers’ goals.

Staff:
- Initiate area ____________ process.
- Oversight of the “________ to _______” to ensure accountability and achievement of goals.
- Provide planning ____________ to BOD & UUAB.
Frequently Seen Faces
Student Government

ASI President
Sarah Storelli

Chair of the Board
Natalia Walicki

Chair of UUAB
Lorin Torbitt

Student Government
Administrative Assistant
Tracy Watson

ASI Directors

Executive Director
Rick Johnson

Director of
ASI Programs
Marcy Maloney

Director of
Business Services
Dwayne Brummett

Director of
Children's Programs
Tonya Iversen
ASI Programs

Asst. Director – ASI Programs
Daren Connor

Program Coordinator
Michelle Crawford

Program Coordinator
Missi Bullock

Public Relations Coordinator
Michelle Broom

Club Services Assistant
Becky Kane

Club Services Assistant
Kelsey Peirce

Administrative Assistant
Kim Ryherd
Business Services

IT Coordinator
Anthony Colvard

HR Coordinator
Carol Brizendine

HR Technician II
Dawn Annoni

Assistant to Executive Director
Judie Hagstrom

Associate Director Facilities
Ron Skamfer

Administrative Assistant
Kay Pasillas

Event Operations Coordinator
Steve Garcia

Facility Scheduling Manager
Jessica Twaddle

Asst. Coordinator – Facility Operations
Jennifer Von Der Lohe
ASI Board of Directors
Ex-Officio Members

Dr. Cornel Morton
Vice President for Student Affairs
University Representative

Bonnie Murphy
Cal Poly Corporation Executive Director
CPC Representative

Dr. James LoCascio
Mechanical Engineering Academic Senate Representative

University Union Advisory Board
Non-Student Members

Kim Gannon
Alumni Relations Alumni Representative

Joel Neel
Facilities Planning University President’s Representative

Vacant
Faculty Representative
President's Office

Dr. Robert Gildden
Interim University President

Provost's Office

Dr. Robert Koob
Provost & Vice President for Academic Affairs

College Deans

Tom Jones
CAED

Dr. David Wehner
CAFES

Erling Smith
CENG

Dr. Dave Christy
COB

Dr. Linda Halisky
CLA

Dr. Phil Bailey
COSAM
ASI Services

What support services can you find in the Business Office?

1. 

2. Fiscal Services

3. 

4. Insurance and Risk Management

5. 

What support services can you find in the Epicenter?

1. 

2. Event Operations

3. 

4. 

5. 

6. Graphics
ASI Programs – University Union

List a few things you can do in the following programs:

ASI/UU Events:
1. __________________________
2. __________________________
3. __________________________

Club Services:
1. __________________________
2. __________________________
3. __________________________

Chumash Challenge:
1. __________________________
2. __________________________

Craft Center:
1. __________________________
2. __________________________
3. __________________________

Poly Escapes:
1. __________________________
2. __________________________
3. __________________________
ASI Programs – Recreation Center

During construction, the Recreation Center is offering the following programs and services:
1. Intramural Sports & Tournaments – academic year only
2. Open Recreation
3. __________________________
4. Personal Training
5. __________________________

ASI Programs – Rose Float

• University tradition since _____________
• Student __________________________
• ______________________ on experience
• ______________________ with Cal Poly, Pomona
• Rose Parade in _________________ on New Year’s Day

Children’s Programs

• In operation since __________________________
• Nationally ________________________ early care and education center
• Provides quality early care and education services for
  approximately _______ children of the campus community,
  from _____ months to _____ years old
• First ______________________ for student parents
• ______________________ education
• Poly ________________ (summer school-age program)
ASI Managed Facilities
University Union

Building Facts:
- Built in ____________
- ____________ square feet
- Chumash Auditorium maximum capacity is ____________
- UU 220
- Conference rooms
  - UU __________
  - UU __________
  - UU __________
- Bishop’s Lounge
- San Luis Lounge

Tenants of the Building:
- BackStage Pizza
- El Corral Bookstore
- Mustang Lanes
- Starbucks
- Student Life & Leadership

Recreation Center

Once expansion of the Recreation Center is completed, the facility will include:
- _____ Fitness Rooms
- _____-Court Gym
- Multi-__________ Center
- ____________ Exercise Space
- ____________ Center
- Indoor ____________ Track
- Racquetball Courts - _______ courts rebuilt with Squash and Wallyball configurations
- Restrooms on ______ floor
- Leisure ______ and Deck
- Additional ______ Volleyball Court
Orfalea Family & ASI Children’s Center

- New facility built in ________
- Approximately _____________ square feet
- _____________ classrooms
  - Infant/Toddler
  - Transitional
  - Preschool
  - _____________
- _____________ as an outdoor classroom demonstration site
- Not under __________ of UUAB; overseen by the BOD
- Outdoor renovation completed in summer ________

Chumash Challenge

- Located in foothills of ______________________________
- ______ mile long course follows Stenner Creek
- High Ropes Course was rebuilt in fall 2002 to reflect new industry ____________
- High Ropes Course includes _______ elements
- Challenge ____________ was rebuilt in winter 2004 to meet new standards.

Sports Complex

- __________ acre complex
- __________ lighted multi-purpose fields, ___ of which are synthetic turf
- 600-seat lighted baseball stadium
- 300-seat lighted softball stadium
- 5 lighted basketball courts
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- Trustees' Resolutions
- Executive Orders of the CSU Chancellor
- Procedural letters and memoranda of the Chancellor's Office
- Campus policies and regulations

ASI Purpose and Objectives

1. To provide for student self-governance
2. To provide authorized programs and services as a student body organization
3. To provide authorized programs and services as a Student Union

ASI Management

Role of the ASI Directors

- Refine the “What”
- Decide on the “How”
- Set organizational priorities
- Drive strategic planning
- Supervise professional staff
- Use assessment information for program/service refinement
- Manage organizational resources

Student Government Overview

Student Government Branches

ASI Student Government is comprised of three branches:

1. Board of Directors
2. University Union Advisory Board
3. Executive Cabinet

Student Government Board of Directors

- The official voice of Cal Poly students
- Approves ASI policies and annual budget ($4.1 million)
- Accepts annual audit of ASI’s books and records
- Manages ASI Elections through the Elections Committee
- Suggests guidelines for student organizations and activities
- Advocates on behalf of the students
- Members attend weekly workshops and bi-weekly BOD meetings
- Members serve on Academic Senate and University-wide Committees
Student Government
Board of Directors – Standing Committees

- Bylaws and Policy Review
- Budget
- Elections
- Internal Review
- Personnel
- Co-Sponsorship Liaison

Student Government
Executive Cabinet

- Carries out the goals of the ASI President under the direction of the Chief of Staff
- Reaches out to students to determine their wants and needs
- Advocates on behalf of the students of Cal Poly
- Focuses the efforts of Lobby Corps
- Members serve on University-wide committees
- Members attend weekly Executive Cabinet meetings

Student Government
University Union Advisory Board

- Reviews and recommends action regarding use of Student Body Center fee
- Reviews and recommends approval of the annual UU budget ($5.4 million)
- Reviews fiscal & operational UU policies
- Reviews commercial subleases and recommends action
- Members serve on University-wide Committees
- Members attend bi-weekly UUAB meetings

** The Recreation Center, University Union, and Sports Complex are under the prevue of UUAB

Fee Structure

ASI is funded by student fees that were approved through various student referenda and operates from two distinct budgets:

ASI: Student Organization Fee = $89.43 per quarter
University Union: Student Body Center Fee = $128.65 per quarter

** A portion of the ASI Fee goes to Athletic Scholarships and Student Community Services.

Fee Structure
Funded by ASI fees

- Administration
  - Student Government
  - ASI President’s Office
  - Board of Directors
  - Executive Cabinet
  - College Councils

- Club Funding
- Club Services & Programs
- ASI Children’s Programs
- Poly Escapes
- Chumash Challenge
- Rose Float (state funded through annual contract)
- Student Referendum Supported
  - Athletic Scholarships
  - Student Community Services

Fee Structure
Funded by UU fees

- Administration
  - Recreational Sports Programs
  - Intramural Sports & Tournaments
  - Open Recreation
  - Aquatics
  - Personal Training
  - Informal Fitness
  - Sports Complex
  - Recreation Center Operations
  - Administration

- UU Programs & Services
  - Craft Center
  - Audio-Visual
  - Information Desk
  - Reservations
  - Union Facility Operations
  - Custodial
  - Maintenance
  - Utilities
  - Commercial Lease Space (Mustang Lanes, SESLOC, Starbucks, BackStage Pizza, El Corral Bookstore)
Fee Structure
Funded by ASI and UU fees
- ASI/UU Events
- Accounting
- Administrative Support
- Assessment & Planning
- Budgeting & Forecasting
- Contract & Lease Management
- Gift & Donation Processing
- Graphics
- Human Resources
- Information Technology
- Marketing
- Payroll
- Project Management
- Public Relations
- Purchasing
- Risk Management & Insurance
- Website Design/Maintenance

Roles of ASI Student Government & Staff
- The Board of Directors determines what they want to accomplish.
- Staff is responsible for how to implement.

Roles of ASI Student Government & Staff - Policy
ASI Board of Directors:
- Reviews & makes recommendations
- Sends issues to subcommittees for analysis
- Approves all ASI policies & changes
- BOD Subcommittee: Bylaw and Policy Review
  - Researches and analyzes issues
  - Recommends policy to Board of Directors
- UUAAB:
  - Reviews & proposes recommends policy for ASI fee funded programs & facilities
  - Makes recommendations to ASI Executive Director & University President
- ASI President & Executive Cabinet:
  - Serves as a forum for issues
  - Identifies and adopts new policy or revisions of existing policy
  - Provides information and background
  - Implements policy changes
  - Adheres to Title V Education Code, Bylaws and Policy Manual

Roles of ASI Student Government & Staff - Programs
ASI Board of Directors:
- Approves all new ASI programs
- Reviews program assessment
- Provides program direction to staff
- Reviews program input/feedback/proposals from staff
- BOD Subcommittees:
  - Recommend resources for programs, staff, funding, etc.
- UUAAB:
  - Reviews program input/feedback/proposals from staff
  - Makes recommendations to ASI Executive Director & University President
- ASI President & Executive Cabinet:
  - Serves as a forum for issues
  - Initiates programs consistent with goals of ASI President and Chief of Staff
  - Staff:
    - Initiates, develops, and implements programs
    - Conducts and report ongoing assessment of all programs and services
    - Updates BOD/UUAAB on program progress

Roles of ASI Student Government & Staff - Fiscal
ASI Board of Directors:
- Reviews and approves annual ASI budget
- BOD Subcommittee: Budget
  - Reviews and recommends ASI Budget for approval, based on fiscal conditions
- UUAAB:
  - Reviews and recommends approval of annual UUAAB budget based on fiscal conditions
- ASI President & Executive Cabinet:
  - Utilizes funds within annual Student Government budget
  - Staff:
    - Develops budgets based on area action plans & ASI Strategic Plan
    - Maintains area budgets and day to day fiscal management
Frequently Seen Faces
In Business Services

- Event Operations Coordinator: Steve Gordon
- Facility Insurance Manager: Jessica Twaddle

Frequently Seen Faces
BOD Ex Officio Members

- Dr. Everett Slabas
  Vice President for Student Affairs
  University Representative
- Brian Murphy
  Cal Poly Corporation Executive Director
  CPO Representative
- Dr. James LeFevre
  Mechanical Engineering
  Academic Senate Representative

Frequently Seen Faces
UUAB Non Student Members

- Team Garnet
  Alumni Relations
  Alumni Representative
- Joe Reff
  Student Printing
  Student Representative
- Susan
  Faculty Representative

ASI Services

Business Office

- Human Resources
- Fiscal Services
- Information Technology
- Insurance and Risk Management
- Provides support services to students and programs

University Union
Support Services in the Epicenter

- Facility Operations
- Event Operations
- Audio/Visual
- Reservations
- Marketing
- Graphics
ASI Programs

ASI/UU Events
- Musical Entertainment
  - Concerts in the Plaza
- Special Events
  - Movies
  - Comedians
  - Speakers
  - ASI After Dark
- UU Gallery

Club Services
The Club Services Program provides services to Cal Poly clubs, Independent Student Organizations, and sport clubs:
- Assistance with event planning and club accounting
- Train Club Officers and Club Advisors
- Process E-Plans and other scheduling requests
- Initiate Club recognition
- Process applications for ASI Club Sponsorship and Club Event Co-Sponsorship

Chumash Challenge
Philosophy:
Individuals learn through self-discovery, reflective analysis, and teambuilding models

Workshops:
- High Ropes Course
- Teambuilding

Clients:
- Approximately 4,000 participants per year
- Age range: 4 - 85

Craft Center
- Surfboard Shaping
- Ceramics
- Flameworaking
- Skateboard Shop
- Stained Glass
- Woodworking
- Jewelry
- Bike Repair Area
- Free Craft Fridays
- Fall & Spring Craft Sales
Poly Escapes

- Equipment Rentals
- Day Trips
- Overnight Trips
- Climbing Wall
- Climbing Competitions
- Ladies Climbing Night
- Gear Swaps/Sales

Recreational Sports

During construction, the Recreation Center is offering the following programs and services:
- Intramural Sports & Tournaments (academic year only)
- Open Recreation
- Aquatics
- Personal Training
- Informal Fitness

Cal Poly Rose Float

- University tradition since 1949
- Student managed
- Hands-on experience
- Collaboration with Cal Poly, Pomona
- Rose Parade in Pasadena on New Year’s Day

Children’s Programs

- In operation since 1973
- Nationally accredited early care and education center
- Provides quality early care and education services for approximately 130 children of the campus community, from 4 months to 6 years old
- First priority for student parents
- Parent education
- Poly Trekkers (summer school-age program)

University Union

**Building Facts:**
- Built in 1968
- 102,000 sq. ft.
- Chumash Auditorium
  - Max Capacity: 996
  - UU 220
- Conference rooms
  - UU 216
  - UU 218
  - UU 219
- Study lounges
  - Bishops Lounge
  - San Luis Lounge

**Tenants:**
- Mustang Lanes
- Starbucks Coffee
- BackStage Pizza
- SESLOC
- El Corral Bookstore
- Student Life & Leadership
Recreation Center

Once expansion of the Recreation Center is completed, the facility will include:
- 3 Fitness Rooms
- 2-Court Gym
- Multi-Activity Center
- Triple Exercise Space
- Wellness Center
- Indoor Jogging Track
- Racquetball Courts – six courts rebuilt with Squash and Wallyball configurations
- Restrooms on 2nd floor
- Leisure Pool and Deck
- Additional Sand Volleyball Court

Orfalea Family & ASI Children’s Center

- New facility built in 1995
- Approximately 9,500 sq. ft.
- 6 classrooms
  - Infants/Toddler
  - Transitional
  - Preschool
  - Kindergarten
- Certified as an outdoor classroom demonstration site
- Not under oversight of UUAB, overseen by the BOD
- Outdoor renovation completed in summer 2009

Chumash Challenge

- Located in foothills of Stenner Canyon
- ½ mile long course follows Stenner Creek
- High Ropes course was rebuilt in fall 2002 to reflect new industry standards
- High ropes course includes 7 elements
- Challenge Wall was rebuilt in winter 2004 to meet new standards

Sports Complex

- 47 acre complex
- 6 lighted multi-purpose fields, 3 of which are synthetic turf
- 600-seat lighted baseball stadium
- 300-seat lighted softball stadium
- 5 lighted basketball courts

Questions?
The ASI Guide to Student Government

Jeopardy

<table>
<thead>
<tr>
<th>ASI Basics</th>
<th>ASI Programs</th>
<th>ASI Facilities</th>
<th>ASI Student Government</th>
<th>Important Dates in ASI History</th>
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<tr>
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</table>

ASI Basics
100 Points

A non-profit 501(c)(3) public benefit corporation and auxiliary organization under the authority of the CSU Board of Trustees

ASI Basics
200 Points

“ASI will be every student’s connection to the ultimate college experience.”

ASI Basics
100 Points

What is ASI?

ASI Basics
200 Points

What is the ASI Vision Statement?
ASI Basics 300 Points
Over 500 students each quarter

ASI Basics 300 Points
What is the approximate number of students that ASI employs?

ASI Basics 400 Points
The five facilities that ASI manages

ASI Basics 400 Points
What are the University Union, Recreation Center, Children's Center, Chumash Challenge, and Sports Complex?

ASI Basics 500 Points
A generous benefactor who established a one million dollar endowment for the Children's Center

ASI Basics 500 Points
Who is Paul Orfalea?
ASI Programs 100 Points
This program allows you to make a pot, shape a surfboard, or make a sign for your club

ASI Programs 200 Points
You can go on a surf trip, white water rafting, or rent equipment from this ASI Program

ASI Programs 300 Points
Concerts in the Plaza, Comedians, Movies, ASI After Dark, Speakers, UU Gallery

ASI Programs 400 Points
This state funded Program connects Cal Poly, San Luis Obispo with Cal Poly, Pomona

ASI Programs 100 Points
What is the Craft Center?

ASI Programs 200 Points
What is Poly Escapes?

ASI Programs 300 Points
What is ASI/UU Events?

ASI Programs 400 Points
What is Rose Float?
ASI Facilities
300 Points
The addition to the Rec Center that will allow for more indoor sports and special events

ASI Facilities
400 Points
Currently 10,000 square feet, this space will increase to 21,000 square feet when the Recreation Center expansion is completed

ASI Facilities
500 Points
Mustang Lanes, Backstage Pizza, Starbucks, SESLOC, and Student Life & Leadership, and El Corral Bookstore

ASI Student Government
100 Points
Student voting members include one student from each college, a BOD rep and the ASI President’s Designee (and the chair when there is a tie)

ASI Facilities
300 Points
What is the Multi-Activity Center (MAC)?

ASI Facilities
400 Points
What is the exercise room?

ASI Facilities
500 Points
Who are the tenants in the University Union?

ASI Student Government
100 Points
What is the University Union Advisory Board (UUAB)?
ASI Student Government
200 Points
The official voice of Cal Poly students

ASI Student Government
200 Points
What is the Board of Directors (BOD)?

ASI Student Government
300 Points
Funding for parking, textbook costs, food/catering

ASI Student Government
300 Points
What are things ASI doesn’t control?

ASI Student Government
400 Points
ASI Club Sponsorship and Event Co-Sponsorship Funding, ASI Policies, Referendum Actions, ASI and UU Budgets

ASI Student Government
400 Points
What are things ASI can control?
ASI Student Government
500 Points
Carries out the goals of the ASI President, reaches out to students to determine their wants and needs, focuses the efforts of Lobby Corps

ASI Student Government
500 Points
What is the Executive Cabinet?

Important Dates in ASI History
100 Points
1998 (Great year for flag football)

Important Dates in ASI History
100 Points
What is the year the Sports Complex opened?

Important Dates in ASI History
200 Points
1993 (Students, faculty, staff, and alumni have been healthier ever since)

Important Dates in ASI History
200 Points
What is the year the Recreation Center opened?
Important Dates in ASI History
300 Points

1973
(when ASI first began shaping the future)

Important Dates in ASI History
300 Points

What is the year the Children’s Center opened?

Important Dates in ASI History
400 Points

1971
(President McPhee was honored)

Important Dates in ASI History
400 Points

What is the year the University Union opened?

Important Dates in ASI History
500 Points

1964
(We got down to business)

Important Dates in ASI History
500 Points

What is the year that ASI was incorporated?
Communication Standards
200 Points
What is the time frame you should respond to email or phone messages?

Communication Standards
400 Points
NEVER – It appears that you are SHOUTING

Communication Standards
400 Points
When CAPITALS should be used in an e-mail?

Communication Standards
600 Points
Every day so you don’t miss a meeting

<table>
<thead>
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</tbody>
</table>
Communication Standards
600 Points

What is the frequency that you should check your zimbra calendar?

Communication Standards
800 Points

So people know if you're coming or not; common courtesy

Communication Standards
800 Points

Why you need to indicate your attendance at meetings? (They may need to establish quorum)

Communication Standards
1000 Points

calpoly.edu

Communication Standards
1000 Points

What is the email address you must use in order for a meeting to populate your calendar?
Student Government Expert
800 Points

A new process for referendums and elections approved by the Board of Directors in 2008

Student Government Expert
1000 Points

Manages ASI Elections

Student Government Expert
1000 Points

What is online voting?

What is the Elections Committee?

Cal Poly
200 Points

The Interim President of Cal Poly?

Cal Poly
200 Points

Who is Dr. Robert Glidden?
Cal Poly 400 Points
This University Housing development expanded student housing by 2,700 beds

Cal Poly 400 Points
What is Poly Canyon Village?

Cal Poly 600 Points
This tenant of the University Union had its grand opening in fall 2008

Cal Poly 600 Points
What is Starbucks?

Cal Poly 800 Points
The event formerly known as Poly Royal

Cal Poly 800 Points
What is Open House?

Cal Poly 1000 Points
CAFES, CAED, CENG, COSAM, OCOB, and CLA

Cal Poly 1000 Points
What are the colleges at Cal Poly?
ASI Who’s Who
200 Points
The calendar, email and meeting coordinator for Student Government

ASI Who’s Who
200 Points
Who is Tracy Watson?

ASI Who’s Who
400 Points
Historian, and go to person for documents, proof reading, and ASI questions

ASI Who’s Who
400 Points
Who is Judie Hagstrom?

ASI Who’s Who
600 Points
The ASI contact for all media inquiries

ASI Who’s Who
600 Points
Michelle Broom, Public Relations Coordinator
ASI Who’s Who
800 Points

The Secretary and Treasurer of ASI

ASI Who’s Who
800 Points

Who is Lorin Torbitt, Chair of the University Union Advisory Board?

ASI Who’s Who
1000 Points

The 4 ASI Directors

ASI Who’s Who
1000 Points

Who are Rick Johnson, Marcy Maloney, Dwayne Brummett, Tonya Iversen?

ASI Misc.
200 Points

Funded by ASI Fees, provides services to Cal Poly student parents at a subsidized cost

ASI Misc.
200 Points

What is the Children’s Center?
ASI Misc. 400 Points
Manages clubs on campus

ASI Misc. 400 Points
What is Student Life & Leadership?
ASI processes paperwork on behalf of clubs, but all clubs are overseen by Student Life & Leadership.

ASI Misc. 600 Points
Refines the “WHAT”, decides on the “How”, sets organizational priorities, drives the Strategic Plan

ASI Misc. 600 Points
Who are the ASI Directors?

ASI Misc. 800 Points
Fiscal Services, Human Resources, Info Technology Insurance and Risk Management, Facility Services

ASI Misc. 800 Points
What is ASI Business Services?
Appendix C
# ASI Board of Directors and Standing Committee Annual Action Matrix

<table>
<thead>
<tr>
<th>Ongoing</th>
<th>Summer</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bills &amp; Resolutions</td>
<td>Approve PERIS Health Insurance contributions (August) by resolution</td>
<td>Report on accepted ASI Audit of Financial Statements</td>
<td>Approve ASI Election packets</td>
<td>Accept Capital Expenditure Report for Fall &amp; Winter</td>
</tr>
<tr>
<td>Consideration of committee recommendations</td>
<td>Accept Audits (September)</td>
<td>Approve changes to BOD Standing Rules (October)</td>
<td>Accept Mid-year Budget Report (May of Board)</td>
<td>Approve Sport Club funding allocations</td>
</tr>
<tr>
<td>Approve replacement board members</td>
<td>Approve BOD Vice Chair</td>
<td>Winter Strategic Plan Update</td>
<td>Final Strategic Plan Report</td>
<td></td>
</tr>
<tr>
<td>Approve co-sponsorship requests</td>
<td>Accept Capital Expenditure Report for Spring &amp; Summer</td>
<td>Approve merit for budget</td>
<td>Approve ASI Budget</td>
<td></td>
</tr>
<tr>
<td>Approve Bylaw amendments</td>
<td>Accept Budget Variance Report (of Bus Svcs)</td>
<td>Announce ASI election results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approve new and amended policies</td>
<td>Accept Five Year Forecast</td>
<td>Elect Chair of the Board for next year</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Review of insurance Summary &amp; Risk Management Plan</td>
<td>Approve Summer Board Representatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Report on Strategic Plan / Area Goals</td>
<td>Approve selection of audit firm (not expired of contract)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Approve ASI Election timeline</td>
<td>Approve continuation of Children's Center operation and participation in CCFP (Bill no longer required)</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Approve Chief of Staff</td>
<td></td>
<td>Approve CSSA membership</td>
<td></td>
</tr>
</tbody>
</table>

## Bylaws & Policy Review
(Director of Business Svcs)
- Consider policy changes submitted by ASI Management
- Review bylaws for content changes reflecting on action of Board
- Recommend changes to Bylaws
- Recommend policy changes as appropriate
- Recommend Bylaw amendments as appropriate

## Personnel
(Executive Director & Coordinator - HR)
- Review new and amended personnel policies and recommendations to BOD
- Review ASI Officer Stipend Policy as required (every 3 years)
- Review changes to Officer Position Descriptions
- Review ASI Employee Benefits proposal
- Review HR policy change recommendations
- Review Personnel Codes and recommend changes as appropriate
- Review annual compensation proposal

## Budget
(Director of Business Svcs)
- Develop understanding of budgets - sources and uses
- Begin discussions on budget planning assumptions & priorities
- Begin budget review meetings & prepare presentation to Board
- Review & revise budget timeline
- Discuss budget review guidelines

---

## ASI Board of Directors and Standing Committee Annual Action Matrix

<table>
<thead>
<tr>
<th>Elections (Director of Children's Programs)</th>
<th>Review Elections Code &amp; recommend changes</th>
<th>Review/issue Electrop Packages and recommend to Board</th>
<th>Finalize election logistics</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Review &amp; propose revisions to Election process, requirements, guidelines</td>
<td>begin meeting w/committee, DLL, etc &amp; election prep</td>
<td>Develop &amp; implement communication plan</td>
</tr>
<tr>
<td></td>
<td>Develop Election timeline - seek Board approval</td>
<td>Make plans for any equipment &amp; publicity</td>
<td>Oversees ASI, Election and election dates</td>
</tr>
<tr>
<td></td>
<td>Determines if of directors to be elected &amp; of signatures needed by ASI, Presidential candidates based on enrollment</td>
<td>Keep Board informed of all activities of Elections Committee</td>
<td>Following election, seek Board approval of results &amp; make recommendations for improvement</td>
</tr>
</tbody>
</table>

## Internal Review (Director of Business Svcs)
- Review annual ASI Financial Audit and report to Board
- Evaluate Club Funding program and bring any policy changes to Board
- Upon expiration of contract with current auditor, review independent auditor service proposals and recommend most appropriate firm

## Advocacy
- CSSA
Board of Directors
Committee Interest Form

Please rank committees of interest and circle if you’d like to chair the committee:

Bylaws & Policy Review  |  Chair □
Budget               |  Chair □
Elections            |  Chair □
Internal Review      |  Chair □
Personnel            |  Chair □
Co-Sponsor Liaison   |  Chair □

Please explain why you would you like to be appointed to your top 2 choices and if you have a chair interest, why you feel that you would be qualified.

□
<table>
<thead>
<tr>
<th>OVERALL EVALUATIONS</th>
</tr>
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<table>
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<tr>
<th>RECOMMENDATIONS</th>
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</table>

<table>
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<tr>
<th>LOGISTICS</th>
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</table>

**TIME OF THE WORKSHOP**
Was the workshop time effective? Yes: No:

If not, what would be your recommendation?
Welcome to the ASI Board of Directors!
Fall Kickoff 2010

Break-Out Goals
- For each Board member:
  - To name and state the role of each subcommittee
  - To have a better understanding of advocacy
  - To better get to know each other

Who is the Board?
- 25 Members
  - 5 CENG
  - 5 CAFES
  - 4 CLA
  - 4 COSAM
  - 4 OCOB
  - 3 CAED
- The Board is the only elected body in Student Government

What is the Board?
- Advocacy:
  - "Official Voice of Cal Poly Students"
- Corporate:
  - "Oversees corporate operations and approves the allocation of student fees"

Corporate Responsibilities
- Approval of ASI and Children’s Center Audit
- Approval of ASI Budget
- 6 Corporate Subcommittees

Break-Out Schedule
(1:30 pm – 3:00pm)
- Icebreaker
- Role of the Board
- Committee Structure

Approval of ASI and Children’s Center Audit
Approval of ASI Budget
6 Corporate Subcommittees
Advocacy Responsibilities

- Outreach:
  - Cookie Campaigns
  - Dollar Dilemmas on Dexter
  - College Councils

- Advocacy:
  - Meet with Administrators/Professors/CP Staff/ASI Staff
  - Write Legislation

The Flyswatter Game!

Which Committee approves club funding applications?

- Co-Sponsorship Liaison
- Internal Review

Which Committee oversees all Student Government related policies?

- Bylaws and Policy

Which Committees’ members must be either graduating or not returning the following year?

- Personnel
- Elections

Which Committee oversees College Council spending?

- Internal Review
- Budget
Board of Director’s Breakout Session Schedule (1:30 pm - 3 pm)

Icebreaker (1:30 – 1:45)

Icebreakers are a good way for the Board members to get to know each other and increase the energy level in the room. It is encouraged to choose a simple and quick icebreaker that won’t interfere with training time while still getting positive results.

Examples (all of these examples are from icebreakersformeeetings.com):

Chain of Connectedness
One person starts out by introducing him or herself to the group by saying, “Hi, my name is James and I like to go hiking.” When someone in the group hears something that James is saying that they have in common with him, that person walks to James and links arms with him. He or she will then say, “This is James and my name is... and we both like to hike.” And then he or she will continue by talking about him or herself. The pattern continues and the last person has to find something that they have in common with the first person. Eventually, everyone’s arms will be locked in one gigantic chain.

Beach Ball
*Materials: Beach Ball with numbers on it.*
Toss it around and wherever your thumb lands answer that question. You may make up the questions or see attached question list.

Grab Bag

*Materials: Bag with random assortment of objects*

Pull out an object from a bag and explain how you are similar to it.

Role of the Board (1:45 – 2:30)
The role of the Board portion of the breakout schedule is outlined in the attached PowerPoint. It covers how many people are on the Board and what colleges they represent. It also gives the definition of the role of the Board and further explains the advocacy and corporate sides of the Board. Most of the breakout session will be providing the Board with real life examples of past Board actions both corporate and advocacy. By formatting the questions like a quiz, it will be interactive and is a creative way to teach the members.

**Committee Structure (2:30 – 3:00)**

At this point during the breakout session, it is recommended to pass out the Committee Interest Form and the Action Item Matrix. This way all of the Board members present have all of the committee names in front of them to reference during the Flyswatter Game. After the Flyswatter Game, it will be time for the Board members to fill out their Committee Interest Forms. The history of each committee packets, one per committee, should be located in the front of the meeting room for the members to reference.
Please give a ranking score to the following categories and insert any comments you may have.

1 = Inadequate
2 = Adequate
3 = Very Good
4 = Excellent

1. **Time Management:** How efficiently was time allocated? Do you think each topic had enough time?

   **Score:**

   **Comments:**

2. **Interaction:** Do you think the games/activities are interactive enough for the Board members? How effective do you think the icebreaker will be at the beginning?

   **Score:**

   **Comments:**

3. **Creativity:** Are the activities innovative? Do you think they will maintain the students’ attention?

   **Score:**

   **Comments:**

4. **Amount of Information:** Do you think all of the necessary information for a Board member is included in this event? Do you think there is too much information incorporated or not enough?

   **Score:**

   **Comments:**

5. **Quality of Information:** Do you think the information included is adequate? Is there anything inaccurate?
Score:

Comments:

6. **Overall Fun**: Overall, do you think the Board members will enjoy this event?

Score:

Comments:

7. **Overall Effectiveness**: Overall, how effective do you this breakout session will be?

Score:

Comments:
The Budget committee has two chief tasks each year; the review, scrutiny and approval of the annual ASI budget. The second is the review of Grant Funding Applications and allocation of mandatory student fees based upon the guidelines for Grant Funding established by last year’s committee. This committee as part of its responsibilities has sole power to review and make recommendations based on specific funding line items within the ASI budget.
## FY 2009-10 UNIVERSITY UNION BUDGET

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<tr>
<th>Fund</th>
<th>Description</th>
<th>INCOME</th>
<th>EXPENSE</th>
<th>NET TOTALS</th>
<th>Budgeted</th>
<th>% Change</th>
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<td></td>
<td>Student Fees</td>
<td>Other</td>
<td>Cash</td>
<td>Non-Cash</td>
<td>Total</td>
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<td>15,919</td>
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<td>54700</td>
<td>Craft Center</td>
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<td>IU Facility Operations</td>
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<td>Recreational Sports</td>
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<td>9,300</td>
<td>9,300</td>
<td>1,094,336</td>
<td>76,591</td>
<td>1,170,927</td>
</tr>
<tr>
<td>55900</td>
<td>Insurance &amp; Utilities</td>
<td>-</td>
<td>-</td>
<td>281,537</td>
<td>-</td>
<td>281,537</td>
</tr>
<tr>
<td>56000</td>
<td>McPhee's</td>
<td>63,000</td>
<td>63,000</td>
<td>-</td>
<td>1,356</td>
<td>1,356</td>
</tr>
<tr>
<td>65200</td>
<td>Union Plant Fund</td>
<td>-</td>
<td>-</td>
<td>61,420</td>
<td>-</td>
<td>61,420</td>
</tr>
</tbody>
</table>

**TOTALS**

|             |                                                  | $ -           | $ 920,256   | $ 920,256  | $ 3,392,934 | $ 544,468 | $ 5,937,401 | $ 4,464,678 | $ 5,009,446 | $ 4,711,941 | 6.1% |

**Transfer from Chancellor's Office**

|             | (4,714,678)                                       |

**OPERATING (SURPLUS)/DEPOT**

|             | $ (250,000)                                       |

**USE OF OPERATING CASH SURPLUS:**

- Surplus allocated for Capital Expenditures and Repair & Replacement Items
  
- Surplus allocated for Long Term Debt Principal
  
- Surplus allocated to Post Retirement Benefit Trust (1)
  
**Total Surplus Uses**

|             | $ 250,000                                         |

---

**Note:**

- **This type of expenditure records the cost of using resources where actual cash may be expended at a different time than that when the benefit is actually realized.** For example, depreciation records as expense, a portion of the cost of a capital expenditure over the term of the useful life of the asset. The non-cash expenditures in this budget are depreciation and post retirement benefits.

(1) - The trust account for the Post Retirement Benefit Obligation is now planned to be established during the fiscal year 2008-2009.
PROGRAM FUNDING SOURCES
(Based on FY 2010-2011 budgets)

Funded by ASI FEES
CAL POLY CLUBS
Club Funding
Club Services & Programs (Epicenter)

ASI PROGRAMS
ASI Children’s Programs
Poly Escapes
Chumash Challenge
Rose Float (contract w/State)

STUDENT REFERENDUM SUPPORTED
Athletic Scholarships
Student Community Services

ADMINISTRATION
Student Government
President’s Office
Board of Directors
Executive Cabinet
College Councils

Funded by UNIVERSITY UNION FEES
UNIVERSITY UNION PROGRAMS/SERVICES
Craft Center
Union Facility Operations
Audio-Visual
UU Welcome Center
Reservations
Union Facility Operations
Custodial
Maintenance
Utilities
Commercial Lease Spaces
Mustang Lanes
SESLOC
Starbucks
Backstage Pizza
El Corral Bookstore

RECREATIONAL SPORTS PROGRAMS
Intramural Sports & Tournaments
Open Recreation
Aquatics
Personal Training
Informal Fitness
Recreation Center Operations
Sports Complex

ADMINISTRATION
University Union Advisory Board

Funding by Combination of ASI FEES & UNIVERSITY UNION FEES

ASI/UU EVENTS

ADMINISTRATION
Business Services
Administrative Support
Accounting
Assessment & Planning
Budgeting & Forecasting
Contract & Lease Management
Gift & Donation Processing
Graphics
Human Resources
Information Technology Services
Marketing
Payroll
Project Management
Public Relations
Purchasing
Risk Management & Insurance
Website Design/Maintenance
### ASI FEE SCHEDULE

<table>
<thead>
<tr>
<th></th>
<th>Summer 10</th>
<th>Fall 10</th>
<th>Winter 11</th>
<th>Spring 11</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASI Programs</td>
<td>35.36</td>
<td>36.60</td>
<td>36.60</td>
<td>36.60</td>
<td>145.16</td>
<td>16%</td>
</tr>
<tr>
<td>Children's Center</td>
<td>11.78</td>
<td>12.19</td>
<td>12.19</td>
<td>12.19</td>
<td>48.35</td>
<td>5%</td>
</tr>
<tr>
<td>Community Service</td>
<td>1.30</td>
<td>1.35</td>
<td>1.35</td>
<td>1.35</td>
<td>5.35</td>
<td>1%</td>
</tr>
<tr>
<td>Athletic Scholarships</td>
<td>40.89</td>
<td>42.43</td>
<td>42.43</td>
<td>42.43</td>
<td>168.29</td>
<td>19%</td>
</tr>
<tr>
<td><strong>ASI Total</strong></td>
<td>89.43</td>
<td>92.57</td>
<td>92.57</td>
<td>92.57</td>
<td>367.14</td>
<td>41%</td>
</tr>
</tbody>
</table>

### UU FEE SCHEDULE

<table>
<thead>
<tr>
<th></th>
<th>Summer 10</th>
<th>Fall 10</th>
<th>Winter 11</th>
<th>Spring 11</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Union</td>
<td>121.85</td>
<td>126.13</td>
<td>126.13</td>
<td>126.13</td>
<td>500.24</td>
<td>56%</td>
</tr>
<tr>
<td>Field Complex</td>
<td>7.00</td>
<td>7.00</td>
<td>7.00</td>
<td>7.00</td>
<td>28.00</td>
<td>3%</td>
</tr>
<tr>
<td><strong>UU Total</strong></td>
<td>128.85</td>
<td>133.13</td>
<td>133.13</td>
<td>133.13</td>
<td>528.24</td>
<td>59%</td>
</tr>
</tbody>
</table>

**TOTAL FEES**

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Summer 10</td>
<td>Fall 10</td>
<td>Winter 11</td>
<td>Spring 11</td>
<td>Total</td>
<td>%</td>
</tr>
<tr>
<td></td>
<td>218.28</td>
<td>225.70</td>
<td>225.70</td>
<td>225.70</td>
<td>865.38</td>
<td>100%</td>
</tr>
</tbody>
</table>

### Student Fee Breakdown FY 2010-2011

- **ASI Programs**: 58%
- **Children's Center**: 16%
- **Community Service**: 5%
- **Athletic Scholarships**: 19%
- **University Union**: 3%
- **Field Complex**: 1%

*ASI UU FEE CHART 10-11*
<table>
<thead>
<tr>
<th>Program</th>
<th>Originated</th>
<th>Funding Source</th>
<th>Oversight Com.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club Services &amp; Programs</td>
<td>ASI Fee Referendum – November 2001</td>
<td>ASI fees</td>
<td>Board of Directors</td>
</tr>
<tr>
<td>Orfaea Family and ASI Children’s Center</td>
<td>ASI referendum(s)</td>
<td>ASI fees</td>
<td>Board of Directors</td>
</tr>
<tr>
<td></td>
<td>Construction – April 1991</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Operation – May 1996</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chumash Challenge</td>
<td>Board of Directors action – Bill #93-05 – May 1993</td>
<td>Self -Support</td>
<td>Board of Directors</td>
</tr>
<tr>
<td></td>
<td>Bill #97-03 – authorized ASI subsidy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poly Escapes</td>
<td>Board of Directors action - Program shift from committee - 1998</td>
<td>ASI fees</td>
<td>Board of Directors</td>
</tr>
<tr>
<td>ASI Events</td>
<td>Board of Directors action - Program shift from committee - 1998</td>
<td>ASI fees</td>
<td>Board of Directors</td>
</tr>
<tr>
<td>Rose Float</td>
<td>Board of Directors action - Program shift from committee - 1998</td>
<td>ASI fees</td>
<td>Board of Directors</td>
</tr>
</tbody>
</table>

**University Union fees fund the following programs**

<table>
<thead>
<tr>
<th>Program</th>
<th>Originated</th>
<th>Funding Source</th>
<th>Advisory Com.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julian A. McFhee University Union</td>
<td>Constructed after referendum for Student Body Center held in 1965. Dedicated 1971 – Leased to ASI</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td></td>
<td>UU Plaza Renovation – UUAB action - Completion 2010</td>
<td></td>
<td></td>
</tr>
<tr>
<td>McFhee’s Games and Bowling Center</td>
<td>Constructed wUU – Operated on behalf of ASI by independent contractor</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td>Craft Center</td>
<td>Constructed wUU - Leased as part of UU to ASI</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td>UU Gallery</td>
<td>Constructed wUU - Leased as part of UU to ASI</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td>UU Epicenter</td>
<td>Union Board - action March 2002</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td>Intramural Sports</td>
<td>Union Board assumed responsibility for Rec Sports July 1990</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td></td>
<td>Program supported by referendum fee 1986</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fitness and Instructional Classes</td>
<td>Union Board assumed responsibility for Rec Sports July 1990</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td>Collegiate Sport Programs</td>
<td>BOD approved Sports Club Task Force Findings March 1990</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td></td>
<td>Union Board assumed responsibility for Rec Sports July 1990</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Per CSU Executive Order, program transferred to State – July 2006</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aquatics</td>
<td>Union Board assumed responsibility for Rec Sports July 1990</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td>Summer Programs</td>
<td>Revenue program developed by Recreational Sports since 1993</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td>Recreation Center</td>
<td>University Union Referendum – February 1986</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td></td>
<td>University Union Referendum for Expansion – February 2008</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expansion began 2010 – estimated completion 2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports Complex</td>
<td>Board of Directors action – October 1997</td>
<td>University Union fees</td>
<td>UUAB</td>
</tr>
<tr>
<td></td>
<td>3 Upper Fields converted to synthetic turf – UUAB action – Opened 7/1/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Outdoor Basketball Courts - UUAB action - Opened 2010</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Internal Review

Because this committee reviews both ASI and UU business it is a “conference committee”. The Internal Review Committee is responsible for evaluating the ASI Club Funding Program and bringing any suggested policy modifications to the Board of Directors for review. Also, upon the pending expiration of ASI’s current accounting services contract, the Internal Review Committee is responsible for reviewing independent auditor’s service proposals and selecting the most appropriate firm.
ASI Club Funding
Club Sponsorship Procedures
Maximum Allotment: $350 per organization per fiscal year

1. Philosophy
   In support of the “Ultimate College Experience,” ASI Club Funding is available for currently chartered student organizations operating under contract with the University. Funding is available to enhance the cultural, educational, social, and recreational opportunities for all Cal Poly students. Independent Student Organizations are no longer eligible to receive ASI Club Funding.

2. Publicity
   Availability of, and procedures for, ASI Club Sponsorship will be publicized through the ASI website (asi.calpoly.edu) and by ASI Club Services through training and educations distributed to the organizations officers and advisors.

3. Eligibility
   Applying organizations must be currently chartered student organizations. Independent Student Organizations are no longer eligible to receive ASI Club Funding. Each organization applying for funds is only eligible for one type of ASI Club Funding per fiscal year. For example, if your organization is granted ASI Club Sponsorship you are ineligible to receive ASI Event Co-Sponsorship.

4. Terms of Funding
   ASI Club Sponsorship supports student run organizations that do not receive funds supported through mandatory student fees (i.e. Instructionally Related Activities (IRAs) or College Councils).
   a. Eligible organizations may apply for ASI Club Sponsorship to support the organization’s mission, programs/activities, and general operations that take place throughout the fiscal year (July 1 - June 30).
   b. Approved organizations will receive up to $350 per fiscal year
   c. ASI reserves the right to disqualify any organization from applying for ASI Club Funding indefinitely for attempts to defraud or deceive.

5. Expenditure Guidelines
   a. Funding must be used for purposes consistent with the California State University Board of Trustees and Campus Administrative Policies.
   b. The following expenditures of ASI Club Sponsorship are NOT PERMITTED:
      1) Expenditures to directly support or oppose any candidate for public office, whether partisan or not, or to support or oppose any issue before the voters as required by California Education Code Title V, Section 42403.
      2) Charitable donations
      3) Alcohol
      4) Door prizes, awards, gifts (including gift cards/certificates).

6. Application Procedures
   a. ASI Club Services will begin accepting applications July 1 in the Epicenter.
   b. Applications are available on the ASI website.
   c. Student Organizations must complete the application, and obtain the signatures of the President and Advisor indicated on the current club charter or roster.
d. Funding will be allocated on a first come, first serve basis.

e. Funding appropriation decisions will be made by ASI Club Services staff and the ASI Co-
Sponsorship Liaison.

f. Funding appropriation decisions will be made by the ASI Chair of the Board until the Liaison
position is appointed.

g. Once ASI Club Funding is exhausted, funds will be available to organizations as unused Club
Event Co-Sponsorship funds are returned. Funds will be allocated once the requested amount
is available.

h. Submittal of an application for ASI Club Sponsorship does not guarantee funding will be
allocated.

7. Disbursement of Funds

a. A completed Payment Request Form (PRF) with appropriate back-up documentation must be
submitted to ASI Club Services in order to access funds.

b. PRF’s must be submitted no later than the last academic day of Spring Quarter. Late PRF’s
will not be processed utilizing ASI Club Funding.

c. Expenses incurred prior to the date of Club Sponsorship approval cannot be reimbursed using
Club Sponsorship funding.
Request for ASI Club Sponsorship ($350)

In support of the “Ultimate College Experience,” ASI Club Funding is available for currently chartered student organizations to enhance the cultural, educational, and recreational opportunities for all Cal Poly students. Independent Student Organizations are no longer eligible to receive ASI Club Funding.

Application
Submittal of an ASI Club Sponsorship application does not guarantee funding will be awarded. Applications are processed on a first come first serve basis.

Eligibility
Applying organizations must be currently chartered student organizations.

Reporting/Reimbursements
Receipts are to be submitted to Club Services no later than the last academic day of spring quarter in order to utilize Club Funding.

Terms of Funding
ASI Club Event Co-Sponsorship supports student run organizations that do not receive other funds supported through mandatory student fees (i.e. Instructionally Related Activities (IRAs) or College Councils).

Student Organization: ___________________________ Account #: ____________

Student Contact Information: ___________________________ Advisor Contact Information: ___________________________

Name: ___________________________ Name: ___________________________
Phone: ___________________________ Phone: ___________________________
E-mail: ___________________________ E-mail: ___________________________

If your organization is receiving financial support from other on-campus entities please list the funding sources below. Examples: Department, Cal Poly Program, IRA funding, ASI line item.

Source: ___________________________ Account #: ____________

Source: ___________________________ Account #: ____________

How do your organization plan on using the funds? Check all that apply.

- Host an event
- Food at Meetings
- Travel Expenses
- Attend an event
- Speaker
- T-Shirts
- National dues
- Marketing
- General Operations
- Other: ___________________________

My signature below indicates that I have reviewed the Club Sponsorship Procedures, and that I take responsibility to ensure that my organization will abide by all University and ASI policies and procedures. I understand that each organization is only eligible for one form of ASI Club Funding per year. Funding must be used for purposes consistent with the California State University Board of Trustees and Cal Poly campus policies. Campus Administrative Policies can be viewed at policy.calpoly.edu.

President Signature: ___________________________ Date: ___________________________

Advisor Signature: ___________________________ Date: ___________________________

Office Use Only:
Club Funding Liaison: ___________________________

Date: ___________________________ Approved   Denied
ASI Club Funding
ASI Club Event Co-Sponsorship Funding Procedures
Maximum Allotment: $1,500 per organization per fiscal year

1. Philosophy
In support of the “Ultimate College Experience,” ASI Club Funding is available for currently chartered student organizations operating under contract with the University. Funding is available to enhance the cultural, educational, social, and recreational opportunities for all Cal Poly students. Independent Student Organizations are no longer eligible to receive ASI Club Funding.

2. Publicity
Availability of, and procedures for, ASI Club Event Co-Sponsorship will be publicized through the ASI website (asi.calpoly.edu) and by ASI Club Services through training and educations distributed to the organizations officers and advisors.

3. Eligibility
Applying organizations must be currently chartered student organizations. Independent Student Organizations are no longer eligible to receive ASI Club Funding. Each organization applying for funds is only eligible for one type of ASI Club Funding per fiscal year. For example, if your organization is granted ASI Club Event Co-Sponsorship funds you are ineligible to receive ASI Club Sponsorship Funds. If an organizations request for ASI Club Event Co-Sponsorship is denied, the applying organization may reapply for ASI Club Sponsorship, while maintaining their priority.

4. Terms of Funding
a. ASI Club Event Co-Sponsorship supports student run organizations that do not receive other funds supported through mandatory student fees (i.e. Instructionally Related Activities (IRAs) or College Councils).
   i. ASI Club Event Co-Sponsorship can fund 50 percent of the total eligible event(s) expenses not to exceed $1,500 per fiscal year.
   b. If an organization is using ASI Club Event Co-Sponsorship funds for more than one event, an application for each event must be completed and submitted to ASI Club Services.
   c. ASI reserves the right to disqualify any organization from applying for ASI Club Event Co-Sponsorship indefinitely for attempts to defraud or deceive.

5. Expenditure Guidelines
a. Funding must be used for purposes consistent with the California State University Board of Trustees and Campus Administrative Policies.
   b. ASI Club Event Co-Sponsorship may be used solely for the purpose of supporting events that are intended to serve a broad range of current Cal Poly students.
   c. ASI Club Event Co-Sponsorship fund up to $500 towards food and beverage expenses. Food must be available to all event participants and not solely performers/event staff.

100
d. The following expenditures of ASI Club Event Co-Sponsorship are NOT PERMITTED:
   1) Expenditures to directly support or oppose any candidate for public office, whether partisan or not, or to support or oppose any issue before the voters as required by California Education Code Title V, Section 42403
   2) Charitable donations
   3) Alcohol
   4) Door prizes, awards, gifts (including gift cards/certificates)
   5) Sole use of transportation.
   6) Sole use of lodging.

6. Application Procedures
   a. ASI Club Services will begin accepting applications July 1 in the Epicenter.
   b. Applications are available on the ASI website.
   c. Student Organizations must complete the application, and obtain the signatures of the President and Advisor indicated on the current club Charter.
   d. Funding will be allocated on a first come, first serve basis.
   e. If an event is sponsored by multiple organizations, only one can receive funds to pay for the event expenses.
   f. Applications and an E-Plan for the event must be submitted to ASI Club Services a minimum of 14 days prior to the event date.
   g. Funding appropriation decisions will be made by ASI Club Services staff and the ASI Co-Sponsorship Liaison.
   h. Funding appropriation decisions will be made by the ASI Chair of the Board until the Liaison position is appointed.
   i. Once ASI Club Funding is exhausted, funds will be available to organizations as unused Club Event Co-Sponsorship funds are returned. Funds will be allocated once the requested amount is available, or a minimum of $500 is available.
   j. Submittal of an application for ASI Club Event Co-Sponsoring does not guarantee funding will be allocated.
   k. An organizations representative is required to meet with ASI Club Services staff prior to the event in order to receive funds.

7. Recognition of ASI Financial Support
   Organizations are encouraged to recognize ASI as a sponsor the event in public announcements and promotional materials whenever practical, using the ASI Club Event Co-Sponsorship logo provided.

8. Reconciliation Procedures
   a. A completed Club Funding Payment Request Form (PRF) with appropriate back-up documentation must be submitted to ASI Club Services in order to access funds.
   b. PRFs must be submitted to ASI Club Services no later than 2 weeks after the event. A one week extension may be granted upon written request to ASI Club Services.
c. Unused funds will be returned if PRFs are not submitted by the due date; late PRFs will not be reimbursed with funding from Event Co-Sponsorship.

d. Organizations are encouraged to complete an ASI Club Funding assessment after their event.

9. Decision Process

a. An email indicating approval or denial of request will be sent to the organizations officer and advisor.

1) If approved, the organizations representative is required to meet with ASI Club Services staff to receive further information.

2) If denied, a written request from the organization to ASI Club Services must be submitted within two weeks of denial notification to appeal the decision.

3) A meeting will be scheduled between the organizations representatives, ASI Club Services staff, and the ASI Club Funding Liaison to discuss the reasons for denial.

4) All decisions after the meeting are final and are not subject to further appeal.
Request for ASI Event Co-Sponsorship ($1,500)

In support of the “Ultimate College Experience,” ASI Club Funding is available for currently chartered student organizations to enhance the cultural, educational, and recreational opportunities for all Cal Poly students. Independent Student Organizations are no longer eligible to receive ASI Club Funding.

Application
Applications for funding and the accompanying E-Plan, must be submitted to Club Services at least 14 days prior to the date of the event. Applications are processed on a first come, first serve basis.

Eligibility
Applying organizations must be currently chartered student organizations.

Terms of Funding
ASI will fund up to 50 percent of the total eligible event expenses not to exceed $1,500 per fiscal year. If an organization is using their annual allocation for more than one event, a separate application must be submitted for each event.

Reporting/Reimbursements
Receipts are to be submitted to Club Services no later than 2 weeks after the event takes place.

Terms
ASI Event Co-Sponsorship supports student organizations that do not receive other funds supported through mandatory student fees (i.e., Instructionally Related Activities (IRAs) or College Councils).

<table>
<thead>
<tr>
<th>Student Organization:</th>
<th>Account #:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Student Contact Information:</th>
<th>Advisor Contact Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: _______________________</td>
<td>Name: _______________________</td>
</tr>
<tr>
<td>Phone: ______________________</td>
<td>Phone: ______________________</td>
</tr>
<tr>
<td>Email: ______________________</td>
<td>Email: ______________________</td>
</tr>
</tbody>
</table>

Event Information:
Event Name: ______________________
Location: ______________________
Date(s): ______________ E-Plan Reference #: __________
Venue Capacity: ______________ Expected Attendance: ______________
Cost to attend event: $__________
If over $20.00 per student, explain the benefits students will receive.
________________________________________

If this event is receiving financial support from other on-campus entities please list the funding sources below. Examples: Department, Cal Poly Program, IRA funding, ASI line item.

Source: ______________________ Account #: __________
Source: ______________________ Account #: __________

If funds are being requested for food, indicate who will be served:
☐ Guest Speakers/Performers ☐ All Attendees
☐ Event Staff ☐ Other: ______________
Request for ASI Event Co-Sponsorship ($1,500)

Please answer the questions thoroughly.
The Club Funding Committee can not adequately assess the event if detailed information is not provided.

What is the purpose of the event?

What activities will take place at the event?

Why should student fees be used to support this event?

Additional Information (attach photos, press releases and bios if available):
## Request for ASI Event Co-Sponsorship ($1,500)

List the total estimated event expenses and descriptions below.

<table>
<thead>
<tr>
<th>Expense</th>
<th>Description</th>
<th>Total Expense</th>
<th>x 0.50</th>
<th>Potential Fund-</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Venue</strong></td>
<td>Total Venue</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Venue Rental</td>
<td></td>
<td>x 0.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>x 0.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Food (1500 Max Co-Sponsorship)</strong></td>
<td>Total Food</td>
<td></td>
<td></td>
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<tr>
<td>Hors d'oeuvres</td>
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<tr>
<td>Meals</td>
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<tr>
<td>Service Fees</td>
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<tr>
<td>Bar/Alcohol</td>
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<td>Not Eligible</td>
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<td>Not Eligible</td>
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<tr>
<td><strong>Service Fees</strong></td>
<td>Total Service Fees</td>
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<tr>
<td>DJ/Music</td>
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<td>x 0.50</td>
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<tr>
<td>Speaker</td>
<td></td>
<td>x 0.50</td>
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<tr>
<td>Lodging</td>
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<tr>
<td>Travel</td>
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<tr>
<td>Hospitality</td>
<td></td>
<td>x 0.50</td>
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<tr>
<td>Honorariums/Gifts</td>
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<td>Not Eligible</td>
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<td>Not Eligible</td>
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<tr>
<td><strong>Equipment Rental</strong></td>
<td>Total Equipment Rental</td>
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<tr>
<td>Audio Visual</td>
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<td>x 0.50</td>
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<tr>
<td>Tables/chairs</td>
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<tr>
<td>Linens/Other</td>
<td></td>
<td>x 0.50</td>
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<tr>
<td><strong>Decorations</strong></td>
<td>Total Decoration</td>
<td></td>
<td></td>
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<tr>
<td>Flowers/centerpieces</td>
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<td>x 0.50</td>
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<tr>
<td>Favors/souvenirs/Gift</td>
<td>Not Eligible</td>
<td>Not Eligible</td>
<td></td>
<td>Not Eligible</td>
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<tr>
<td>Balloons/Other</td>
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<td>x 0.50</td>
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<td><strong>Marketing</strong></td>
<td>Total Marketing</td>
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<td>Printed Material</td>
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<tr>
<td>Other</td>
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<td><strong>Other</strong></td>
<td>Total Other Expenses</td>
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<tr>
<td>Other</td>
<td></td>
<td>x 0.50</td>
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<tr>
<td>Other</td>
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*$1,500\quad\text{Maximum}$
Request for ASI Event Co-Sponsorship ($1,500)

Check all boxes that apply:

<table>
<thead>
<tr>
<th>Target Audience:</th>
<th>Type of Event:</th>
<th>Means of Advertisement:</th>
</tr>
</thead>
<tbody>
<tr>
<td>All ages</td>
<td>Banquet</td>
<td>Cal Poly Report</td>
</tr>
<tr>
<td>Alumni</td>
<td>Comedy</td>
<td>Club Ad Board</td>
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<tr>
<td>College Specific</td>
<td>Concert</td>
<td>Club E-mail</td>
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<td>Community Members</td>
<td>Cultural</td>
<td>Club Mailboxes</td>
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<td>Cultural Groups</td>
<td>Dance</td>
<td>Community Calendar</td>
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<tr>
<td>Faculty/Staff</td>
<td>Educational</td>
<td>Email</td>
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<tr>
<td>Freshman</td>
<td>Film</td>
<td>E-Marquee</td>
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<tr>
<td>Grad Students</td>
<td>Fundraiser</td>
<td>Facebook</td>
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<tr>
<td>Greek</td>
<td>Informational</td>
<td>Flyers</td>
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<tr>
<td>High School Students</td>
<td>Novelty Act</td>
<td>Handbills</td>
</tr>
<tr>
<td>Men</td>
<td>Recreational</td>
<td>Information Table</td>
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<td>Residence Halls</td>
<td>Speaker</td>
<td>Mustang Daily Ad</td>
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<td>Upperclassmen</td>
<td>Sponsored Event</td>
<td>My Cal Poly</td>
</tr>
<tr>
<td>Women</td>
<td>Sports</td>
<td>Press Release</td>
</tr>
<tr>
<td>Other (list):</td>
<td>Other (list):</td>
<td>Other (list):</td>
</tr>
</tbody>
</table>

My signature below indicates that I have reviewed the ASI Event Co-Sponsorship Procedures, and that I take responsibility to ensure that my student organization will abide by all University and ASI policies and procedures. **I understand that each organization is only eligible for one form of ASI Club Funding per year.** Funding must be used for purposes consistent with the California State University Board of Trustees and Cal Poly campus policies. Campus Administrative Policies can be viewed at policy.calpoly.edu

President Signature: ___________________________  Date: ____________  Advisor Signature: ___________________________  Date: ____________

Office Use Only:

Club Funding Liaison: ___________________________  Date: ____________  Approved  Denied

106
ASI Club Funding
ASI Sport Club Funding Procedures
Maximum Initial Allotment: $4,000 per organization per fiscal year

1. Philosophy
   In support of the “Ultimate College Experience,” ASI Sport Club Funding is available for chartered sport clubs that are active within the Sport Club Council. Funding is available to assist with the expenses associated with supporting the activities of the sport club.

2. Publicity
   Availability of, and procedures for, ASI Sport Club Funding will be publicized through the ASI website (asi.calpoly.edu) and by ASI Club Services through training and educations distributed to sport club officers and advisors.

3. Purpose
   ASI Sport Club Funding was created to support the efforts of the Sport Club Council and through them the respective sport clubs.

4. Eligibility
   Applying organizations must be currently chartered sport clubs that are recognized by the Sports Club Council. Each organization applying for funds is only eligible for one type of ASI Club Funding per fiscal year. For example, if a sport club is granted ASI Sport Club Funding, they are ineligible to receive ASI Club Sponsorship or ASI Club Event Co-Sponsorship. The Sport Club Council is ineligible to receive ASI Club Funding.

5. Terms of Funding
   ASI Sport Club Funding supports sport clubs that do not receive other funds supported through mandatory student fees (i.e. Instructionally Related Activities (IRAs) or College Councils).

   a. Individual Sport Clubs can apply through the Sport Club Council, who will submit a Sport Club Funding Allocation Report to ASI Club Services.
   b. The Sport Club Funding Allocation Report may not exceed the amount allocated by the ASI Board of Directors.
   c. Each individual Sport Club may receive up to $4,000 in initial Sport Club Funding.
   d. ASI reserves the right to disqualify any organization from applying for ASI Sport Club Funding indefinitely for attempts to defraud or deceive.
   e. The ASI Board of Directors will approve the next fiscal year’s budget during spring quarter.
   f. Once approved, the ASI Club Funding Liaison will notify the Sport Club Council with the approved amount of Sport Club Funding.
   g. All funds not initially allocated will remain in the Sport Club Council account and may be allocated at the discretion of the Sport Club Council.
6. Expenditure Guidelines
   a. Funding must be used for purposes consistent with the California State University Board of Trustees and Campus Administrative Policies.
   b. The following expenditures of ASI Sport Club Funding are NOT PERMITTED:
      1) Expenditures to directly support or oppose any candidate for public office, whether partisan or not, or to support or oppose any issue before the voters as required by California Education Code Title V, Section 42403.
      2) Charitable Donations
      3) Alcohol
      4) Door prizes, awards, gifts (including gift cards/certificates)
      5) Payroll expenses associated with coaching or consultation fees.

7. Application Procedure
   a. Initial Funding
      1) The Sport Club Council must submit a Sport Club Funding Allocation Report, containing specific funding amounts for each sport club recognized within the Sport Club Council, to ASI Club Services by the seventh week of spring quarter.
   b. Remaining funding
      1) The Sport Club Council must submit a Sport Club Funding Allocation Report to ASI Club Services detailing the allocation of remaining funds.

8. Recognition of ASI Financial Support
   Sport Clubs are encouraged to recognize ASI as a sponsor in public announcements and promotional materials whenever practical, using the ASI Sport Club Funding logo provided.

9. Reconciliation Procedures
   a. A completed Payment Request Form (PRF) with appropriate back-up documentation must be submitted to ASI Club Services in order to access funds.
   b. PRF’s must be submitted no later than the last academic day of Spring Quarter. Late PRF’s will not be processed utilizing ASI Sport Club Funding.
   c. Unused funds will be returned if PRFs are not submitted by the due date.
   d. All Sport Club Funding must be reconciled by the end of the fiscal year.
   e. Sport clubs are encouraged to complete an ASI Club Funding assessment after funds have been reconciled.

10. Reporting
    a. The Sport Club Council is required to attend at least one Board of Directors meeting on a quarterly basis to provide an update as to how the funds are being utilized. Meetings must be scheduled with the Chair of the Board in advance.
    b. The Sport Club Council must complete and submit the Annual Report to the Chair of the Board by the last Board of Directors meeting of the academic year.
<table>
<thead>
<tr>
<th>GOLD TIER</th>
<th>Sport Club Funding Allocation:</th>
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<tbody>
<tr>
<td>Teams:</td>
<td>Percent of Sport Club Funding Spent:</td>
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**CONTINGENCY FUNDING**

<table>
<thead>
<tr>
<th>Teams:</th>
<th>Amount of Sport Club Funding Provided:</th>
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<tbody>
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**TOP EXPENDITURES**

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**HIGHLIGHTS OF THE YEAR**

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Please submit the completed report to the Chair of the Board by the last Board of Directors meeting of the academic year.