



PUSD ASB CLUB HANDBOOK



In order for your club/organization to stay active, the advisor's signature verifying that this handbook has been received and read is required. Please sign the Club Handbook Compliance Form and leave in the drop box outside Ms. Rogelstad's office.



CLASS/CLUB/ORGANIZATION ADVISOR'S INTRODUCTION

Welcome to the world of advisors! This task, traditionally, is one that allows students and staff members to communicate and work together in an area of mutual interest. Furthermore, class and club advisors have an important role in teaching students how to plan ahead, create a budget based upon goals of the organization, exercise wise financial decision-making, run a democratic institution, learn parliamentary procedure and model great leadership.

With the advent of state legislation in 1984, the roles of club advisors had been in transition. Now, steps must be taken to be sure that we are in accordance with this legislation. Stated, as briefly as possible, the Poway Unified School District allows a limited open forum to exist on campus. This means that the school has school sponsored clubs, which are co-curricular, and it has clubs that are religious, political or philosophical in nature, which are not school sponsored, but are allowed club privileges and a custodial advisor.

FULL SCHOOL SPONSORED CLUB ADVISOR (Activity Allowed)

This type of club is considered either co or extra-curricular. Here are some guidelines:

- The clubs are under the care of a custodial advisor who is a **district credentialed teacher**.
 - The advisor helps establish the framework, which reflects the goals and attitudes of the club and its members and aligns the club to enhance the program.
 - The advisor follows prescribed procedures for room usage, finances and activities.
 - The advisor must fill out the appropriate paper work, permission slips, liability waivers, and assure the appropriate number of chaperones are present for any event even if it is an after school activity. A ratio of 20:1 is recommended for student/staff supervision.
 - Assumption of Potential Risk and Release of Liability Agreement for Voluntary Activity (LSS-19 Form)
 - Advisor collects and keeps on file for one year
 - Trip Authorization Transportation Request (T-19 Form) turned in and approved by Administration 10 working days prior to trip if within county, 30 working days prior to trip if out of county
 - Private Vehicle Transportation for Students Off-Site Study Experience (T-30 Form)
 - If applicable – Advisor collects and keeps on file
- *Forms can be found on the PUSD Intranet: <https://intranet.powayusd.com/forms/>*
- The advisor and the student leaders work hand in hand to set goals and guide the club throughout the year.
 - The advisor helps students prepare and submit a yearly budget to ASB.

PARTIAL SCHOOL SPONSORED CLUB ADVISOR (Discussion Only) (Limited Open Forum, PUSD Board Policy 5.23.1)

Clubs that are of a political, philosophical, religious, or activities considered high risk (as outlined in Risk Management Guidelines for ASB Activities & Student Clubs) are not school sponsored, but are offered some of the same privileges of a Full School Sponsored Club. Here are some guidelines:

- The clubs are under the care of a custodial advisor who is a **district credentialed teacher**.
- A custodial advisor is mandated by law **not** to set goals, dictate policy, or run meetings.
- Advisors are not to make their personal or ideological opinions the focus of the club.
- The advisors are there only to insure that the rules of the school are upheld with regard to safety, room use, and financial transactions. Discussions are to be run solely by the students.
- This type of club is limited to meeting during the established club meeting day & time, and must take place on campus. (Discussions may NOT include off-campus activity planning.)
- The club is allowed to have speakers from the community be presenters during their meetings, but they must be approved, as all speakers are, through the office. They may not meet with the students on a consistent basis.
 - Restriction may apply. Risk Management may need to be consulted.



Reasons to Freeze a Club as Inactive Status:

- Inactivity (does not regularly meet after one year)
- Does not turn in proper documents in a timely manner
- Lacks a credentialed teacher as an advisor
- Does not attend Inter-Club Council meetings
- Does not submit a copy of club minutes with financial request when requesting payment or reimbursements on a P.O.
- Does not get advertisements stamped with ASB approval before hanging on campus

Field Trips

Permission Slips When conducting a field trip some (or all) of the following forms must be signed by a parent:

LSS-19 "Assumption of Potential Risk and Release of Liability Agreement for Voluntary Activity"

RM-200-4 "Awareness and Liability Release for Privately-Sponsored Activity"

T-19 "Trip authorization / Transportation Request"

T-30 "Private Vehicle Transportation for Students Off-Site Study Experience"

Permission slip packets are available from Mrs. Szymanski.

PUSD Board Policy 3.19.1

Any out-of-San Diego County field trips must be submitted to PUSD Learning Support Services for approval 30 days prior to the trip.

Any field trips taking place outside of California need to be submitted to PUSD Learning Support Services for approval 60 days prior to the trip and have PUSD Board approval. Please see the PUSD website for the Board Meeting schedule and plan ahead.

Items to be Included in Class/Club/Organization Binder**5 tabs**

1. **Constitution** - This is for your completed constitution.
2. **Minutes** - This is where you keep all records of club business. Don't forget to make a copy and turn it in to ASB with any financial request (minutes must reflect expenditure). Please use the enclosed minute template.
3. **Fundraising** - This is where copies of your approved budget should go as well as copies of all approved fundraiser request forms.
4. **Advertisements** - This is where all copies of approved flyers and advertising materials should be kept
5. **Other** - This is a place you may keep any other club business as needed.



Class/Club/Organization Officer & Duties

The club officers are critical to the success of a club. Their time and dedication can help ensure that a club will be fun and productive.

Class/Club/Organization President

The president is the leader of the club. The club is usually only as effective as the president, who must be committed to the goals and purposes of the organization. The president presides over and conducts meetings according to parliamentary procedures. The president is also responsible for developing agendas, scheduling fundraisers, creating a budget, and working with the club's advisor. The club president must also attend or designate someone to attend the mandatory Inter-Club Meetings and report back to club members.

President Duties

1. Before the meetings:
 - Prepare an agenda with other club officers
 - Meet with club advisor to review agenda
 - Ensure all club members are notified about the time and location of the meeting
 - Ensure meeting location is reserved and all appropriate paperwork has been submitted
2. During the meetings:
 - Conduct the meeting
 - Follow the agenda
 - Encourage participation by all club members and visitors
 - Help clarify activities and recommend a plan of attack
 - Summarize action items and ask for volunteers to chair necessary sub- committees, as needed
 - Conclude the meeting and set next club meeting date
3. After the meetings:
 - Review the meeting with other club officers and advisors to discuss ways of possible improvement
 - Plan next meeting's agenda

Class/Club/Organization Vice President

The Vice President assists the president in carrying out his/her duties. In the absence of the president, the Vice President presides at club meetings and carries out all additional responsibilities normally done by the president. The most important role of the Vice President is to oversee all committee work.

Vice President Duties

1. Before the meetings:
 - Meet with any outstanding committees prior to the club meeting and reviews
 - progress
 - Prepares a report on committee works and progress
 - Help prepare agenda with other club officers
2. During the meetings:
 - Assist committee chairperson in making committee reports
 - Collect and maintain all committee work assignments
3. After the meetings:
 - Carry out any tasks delegated by the president
 - Follow up on committee work or assignments
 - Help plan next meeting with other club officers



Class/Club/Organization Secretary

The Secretary must take accurate notes at all meetings and prepare minutes (See "Meeting Minutes" section). In addition, the Secretary prepares correspondence on behalf of the club. The Secretary assists the President in keeping permanent records for the club and copies of all minutes and committees reports. The secretary maintains a copy of the club constitution and the club handbook for reference when needed.

Secretary Duties

1. Before the meetings:
 - Help prepare agenda forms
 - Ensure that the minutes from the previous meeting are approved and copies of the new agenda are ready to be passed out
 - Assist Vice President in having all necessary tools such as paper, pencils, and master calendar for meeting
2. During the meetings:
 - Take attendance
 - Read last meetings minutes and approve in minutes
 - Record the actual working of any motion
 - Take careful notes to create minutes (see template)
3. After the meetings:
 - Prepare minutes in concise, clear language
 - File copies of minutes for future reference in club binder
 - Complete any required club correspondence
 - **Submit minutes to ASB (monthly)**

Class/Club/Organization Treasurer

The club treasurer is responsible for maintaining accurate financial records for all expenditures. The treasurer reports all money spent and collected and of the account balance.

Treasurer Duties

1. Before the meetings:
 - Prepare financial report
 - Help prepare agenda with other club officers
2. During the meetings:
 - Make a report of money spent, collected, and current balance
 - Issue receipts when required
 - Make a year-end report and maintain accurate accounting books at all times
3. After the meetings:
 - Maintain up to date budget log
 - Handle any club financial business and ensure all funds are turned over to the school financial clerk in a timely manner
 - Submit any financial request with meeting minutes attached in which club funds were approved



Meeting Minutes

Because there is a formal process of student governance for organized student groups, each club/organization must prepare and maintain a record of each meeting, called minutes. The meeting minutes serve as the record of each meeting and demonstrate that the club has followed all Rancho Bernardo High School, PUSD, and state policies and procedures. Please label your minutes with your Club's name.

At minimum, the following information should be documented in the meeting minutes:

- Name of the club holding the meeting and the date, time, and place of the meeting
- Names of those who attended
- What was discussed during the meeting
- What action was taken during the meeting
- The results of any votes taken, including who made a motion and who seconded the motion
- Who prepared the minutes

It is crucial that the minutes document any action taken regarding student funds and fundraisers. In regard to motions, the minutes must include:

- A motion to spend money
- The name of the student who made the motion
- The name of the student who seconded the motion
- How many votes were for the motion, abstention, and whether the motion was carried (approved).

Keep a copy of all minutes in your club binder.

A copy of all minutes must be submitted with any financial request.

In order to maintain your financial ASB account, your binder must be kept up to date and available to the VP of Communications and/or the ASB Director for periodic inspection.

The ASB copy of your binder must be kept in perfect order for random audits. Any club found to be out of compliance will be moved to the "Inactive" status and all financial accounts will be frozen.

The bottom line: keep a copy of everything in your binder and provide ASB with a copy.



Class/Club/Organization Minutes Instructions

Name of Organization: _____

Date: _____ Time: _____

Location: _____ Advisor Present: _____

Quorum present? _____ Yes _____ No

(51% of Club members present or other percentage established in Article VIII of Club Constitution)

1. Call to Order

President states, "The meeting will please come to order."

Time: _____ by: _____ Office held: _____

2. Minutes

President states, "The secretary will read the minutes of the last meeting."

After the reading, the President asks, "Are there any corrections or additions to these minutes?"

If so, members ask permission to speak. "I move that these minutes be amended to read..." A second motion is required. Clarification and discussion is permitted. Finally, a majority vote is required.

If not, President states, "The minutes are approved as corrected."

The Secretary signs the minutes, "Respectfully submitted." They may be initialed by the President.

Last meeting's minutes were amended and approved? _____ Yes _____ No

3. Report of Officers

a. President's Report _____ Yes _____ No

Provided by _____

b. Secretary's Report on correspondence or communication

Each communication should be handled by a main motion before another is read. The President will request a motion on the matter. "Would anyone like to make a motion that we go on to the next order of communication.

1. "I move that..."

2. "I second..."

3. "Discussion..."

4. "Vote – Majority"

Provided by _____

c. Treasurer's report

Income generated since last meeting

Expenses paid since last meeting

Reimbursement Issues

Balance of Treasury

Provided by _____



4. Reports of Committees

President will call upon the Chairperson of the Committee to make the report.

The report is read.

After this has been done, the President says: "This report will be placed on file.

Any action required in this report will be taken care of under the proper order of business."

5. Unfinished Business

This is any business postponed from a previous meeting. It includes any action required in a report given earlier (i.e. a recommendation to pay for something)

would now be presented by the President, requesting a motion on the matter.

Discussion follows the motion and then a vote is taken.

President states, "We are now ready for old business, which includes _____ (topic). Will someone make a motion so that we may discuss the question?"

- a. I move that _____ (topic)
- b. I second the motion.
- c. President states, "It has been moved and seconded that _____ (topic). Is there any discussion? Discussion follows.
- d. Vote
- e. Next topic. Will someone make a motion so that we may discuss _____ (topic).

6. New Business

President states, "We are now ready for new business, which includes

_____ (topic). Will someone make a motion so that we may discuss the question?"

- a. I move that _____ (topic)
- b. I second the motion
- c. President states, "It has been moved and seconded that _____ (topic) Is there any discussion? Discussion follows.
- d. Vote
- e. New topic. Will someone make a motion so that we may discuss _____ (new topic)

(NewBusiness) _____

7. Program of the Meeting – Guest Speaker, Movie or Slide Presentation

8. Assessment of the meeting

9. Adjournment

- a. I move that we adjourn the meeting
- b. "I second"
- c. Discussion
- d. Vote
- e. President declares the meeting adjourned at _____ a.m. / p.m.

10. Minutes submitted by _____

Attach any additional minutes, if there wasn't sufficient space to write all information.



Class/Club/Organization Minutes Form

Name of Organization: _____

Date: _____ Time: _____

Location: _____ Advisor Present: _____

Quorum present? _____ Yes _____ No

1. Call to Order

2. Minutes

3. Report of Officers

c. Treasurer's report

4. Reports of Committees

5. Unfinished Business

6. New Business

7. Program of the Meeting – Guest Speaker, Movie or Slide Presentation

8. Assessment of the meeting

Club Secretary signature _____

***Attach any additional minutes, if there wasn't sufficient space to write all information.



Finances

Legal Issues and Class/Club ASB Trust Accounts

FAQS

1. Who can use money in ASB club trust accounts?

- a. Students. Any funds collected in any way and then deposited into ASB take on all of the rules and laws covering ASB, regardless of whether the ASB account is called a trust account, sports trust account, or anything else.
- b. Funds in ASB trust accounts are *not* controlled by the adults.

2. Is it legal to require fees from students in order for them to participate?

- a. No. PUSD Board Policy 3.19.2 Extra-Curricular Activities says "no students shall be barred from an activity because they did not participate in fund-raising".
- b. Requiring low income students and their families to apply for a fee waiver is considered discriminatory
- c. Whenever a particular curriculum or extra-curricular program is adopted, all supplies must be provided free of charge by the school district
- d. example: *requiring* the purchase of a team "spirit pack" in order to be a member of the team
- e. example: *requiring* a transportation fee to join the basketball team (Article IX, Section 5 of the California Constitution)

3. What are the big financial mistakes that will get me into trouble and expose me to legal action and/or freezing a class/club trust account?

- a. Not getting prior approval on a financial request (P.O.)
- b. Conflict of interest
- c. "co-mingling" of funds
- d. Giving "gifts of public funds"

4. What is a conflict of interest?

- a. The consultant is in a position to influence a District decision in which he/she might reasonably be expected to have financial interest
- b. example: the ASB Director's brother owns a screen printing business and she has the ASB purchase \$10,000 worth of screen printing and shirts from her brother's company delivering a profit to her brother (needs competitive bids for shirts and screen printing submitted)
- c. example: The cheer advisor's daughter embroiders \$15,000 worth of cheer gear, bringing the advisor's daughter over \$2000 worth of profit on her embroidery. (needs competitive bids on embroidery submitted)
- d. example: The Track & Field coach uses his own track equipment company to purchase all of the school track & field equipment and the coach makes the profit on each purchase (needs competitive bids from other vendors submitted)



5. What does it mean to “co-mingle” funds?

- a. Mixing private funds and public funds together in the ASB trust account
- b. Example: coach purchases all of the gear for a team through his private bank account, collects money from members of the team (public funds) and then writes one personal check to the clothing company
- c. Cheer advisor’s daughter completes the embroidery order for \$15,000 worth of gear, pays the clothing vendor out of her own private bank account and then submits a request for reimbursement to the cheer club account after students have paid into it for the gear and embroidery
- d. Mixing booster and athletic club funds together

6. What are some examples of giving gifts of public funds?

- a. Purchasing flowers for a community member who is ill through the club account
- b. Purchasing bath mats for an employee’s mother through a trust account
- c. Purchasing gift cards using club trust account money to be given to individual students, parents, volunteers, etc. as a reward or a gift
- d. Students are not allowed to donate money to charity under Gift of Public Funds.

RBHS FINANCIAL POLICY:

- **It is the club’s responsibility to ensure there are sufficient funds in the account *prior* to making a financial request or purchase and then submitting for reimbursement.**
- **The dollar limit for reimbursements to individuals without a prior P.O. is \$500. Original receipts for any purchase by individuals under \$500 should be submitted to the finance office. These will be reimbursed in a timely manner.**
- **A P.O. is required for any purchase over \$500. This includes reimbursement to any individual, parent and/or advisor. Do not spend your own money, or have parents spend theirs, if a P.O. is not in place.**
- **For online purchases, especially those in excess of \$500, we ask that you use the ASB Purchase Card. This will eliminate you (or parents, etc.) having to use your own money up front. See Mrs. Mele or Ms. Rogelstad for this.**
- **A copy of meeting minutes reflecting any and all expenditures must be submitted with ALL financial requests. Any request submitted without a copy of the minutes will be denied.**
- **Receipts must be submitted in a timely manner in order to ensure reimbursement.**



Fundraiser Policy

The ASB Director is regarded as the Principal's designee under PUSD Board Policy 3.19.2 for fundraising.

The following guidelines and expectations are to be followed in order for your club or team to sell any food, product or beverage on campus or outside of school.

1. PUSD Board Policy 3.19.2 No student should be made to feel uncomfortable or pressured to provide funds. The staff is expected to emphasize the fact that *donations are always voluntary*. No student shall be barred from an activity because they did not participate in fundraising.
2. PUSD Board Policy 3.19.2 Volunteers age 11 and older must present potential donors or buyers with information, including the purpose of the solicitation and the address from which further information about revenues and expenses can be obtained.
3. In order to hold a fundraiser, a **Fundraiser Request Form** must be completed and approved **two weeks before the sales are to begin**. Selling products without this paperwork will result in **terminating all sales and returning all proceeds to the ASB General account**. This form may be picked up in the ASB room or printed off of the school's website.
4. Throughout the school year, clubs and teams are only allowed to sell products (non-food) during school hours for 2 weeks (or 10 school days). These days may or may not be consecutive. No two groups may sell similar items on the same day.
- 5. Food sales and/or giveaways are not allowed during the school day.**
6. According to the district and state policies, soda and non-nutritional foods may not be sold on campus during school hours. Off campus fundraisers are unlimited but still **need to be approved by ASB**. Soda and non-nutritional foods may be sold after the end of the school day. **(The school day is now defined from midnight to 30 minutes after the end of the school day. 12:00 a.m.-3:00 p.m.)**.
7. **If a cash box is needed** for your fundraiser, **please request one from the finance office at least 48 hours prior to the event**. Please pick up the cash box by 3:30pm, when the Finance Office closes or make other arrangements. These forms are available in the Finance Office. At the end of your sales, the Cash Box must be itemized and returned to the Finance Office. For your protection, the monies are never to leave campus or be stored in individual classrooms for any length of time.
8. **Do not take money out of the concession cash box for purchases made no matter the circumstance.**
9. The school logo, font, specs and colors must be specifically adhered to when ordering clothing or personalized items.
10. **Generic RBHS spirit wear is reserved for ASB. All other clothing/attire sold must be specific to the club or organization (i.e.; RBHS Football/Cheer/Key Club).**
11. All advertisements/flyers, or fundraiser requests forms must be approved and stamped by ASB before making copies.
12. One copy of each advertisement must be kept in your binder, as well as a copy for the ASB binder.
13. All **posted advertisements must use blue painter's tape on glass, tile or painted surfaces**. Please do not post on the windows of food services. Please ask permission before posting in classrooms or on classroom windows.



Club Handbook Compliance Contract

2017-2018

To be read and signed by Advisor before Club will be placed on active status. Please return this one page only to ASB.

I have read and received the Club Handbook. Class/Club advisors have a fiduciary responsibility to ensure that all club activity falls within the boundaries of the law. I will follow the procedures listed and abide by all regulations. If for any reason, rules are not followed, I acknowledge that ASB and Finance have the right to freeze my account and to place the club on "Inactive Status" (which will not allow funds to be received or distributed) until the club is back in compliance.

Please sign this page and return to the drop box outside Ms. Rogelstad's office.

Upon receipt of this contract, and once your club is approved and compliant, your ASB financial account, if needed, will be activated.

Name of Club

Advisor's Name

Date

Advisor's Signature

Club President's Name

Date

Club President's Signature