



ASB GUIDELINES

2019-2020

STUDENT ACTIVITY FUNDS

- Funds derived from the student body as a whole shall be expended in a manner approved by and to the benefit of the student body as a whole.
- Student body funds shall be expended in such a way as to benefit those students currently in school who have contributed to the accumulation of such funds.

ORGANIZED/UNORGANIZED

- Organized – Student organizations in middle and high schools are called Organized ASB because the students organize their activities around student clubs and a student council.
- Unorganized – Students at school sites that do not govern the ASB organization, such as Elementary, Adult Education and Continuation Schools. (Some elementary schools have a student council and are an Organized ASB).
- All current and new clubs must submit a Club Application Form on School Stream and *email a copy of the Club Constitution and Bylaws.*

MINUTES

- The club meeting minutes serve as a record of each meeting and demonstrate that the student council or club has followed the ASB organizations policies and procedures.
 - Minutes – should be signed by the ASB Secretary
 - Sign In Sheet – There should be an original sign in sheet attached to the minutes
 - Information – The Minutes should include details of all proceedings including financial matters pertaining to the budget which include:
 - Approval of Fundraiser
 - Expenditures authorizations (Purchase Orders)
 - Increases to Purchase Orders (Amendments)
 - Approval of any funds to be invested (Donations & Transfers)

PURCHASE ORDER (PO)

- Anyone requesting a purchase order needs to make sure that the funds are available in the ASB account. You cannot spend more than what you currently have. All vendors must have a W9 on file at the District Office. ***If you plan on making a purchase with a new vendor please ask for a W9 and copy of Social Security card only if they included the number in the W9 so I can add the vendor to our District vendor list.*** You will also need to make sure that the purchase you wish to make is allowed by ASB.

Page 4 has a list of Allowable and Prohibited Purchases

- You will need to submit a Purchase Order Request on School Stream
 - How do you access School Stream? Log on to the District website. Click on the Staff tab and select School Stream.
 - School Stream Login and Password: This information is the same as your computer login and password
 - You can view your school sites School Stream Forms by clicking FORMS and type **ASB** in the magnifying glass bubble (upper right hand side). e.g. ASB
 - Look for the Request for Purchase Order form and click

Form Name	Description
ASB/BD - Authorization For Advance Form	Bobby Duke Form
ASB/BD - Club Application Form	Bobby Duke ASB form
ASB/BD - Donation to ASB Form	Bobby Duke Form
ASB/BD - Report on Ticket Sales Form	Bobby Duke Form
ASB/BD - Request to Carry Over Excess Ending Balances	Bobby Duke Form
ASB/BD Collection Report	Bobby Duke ASB form
ASB/BD Equipment Donation Form	Bobby Duke ASB form
ASB/BD Request For Fundraiser Approval	Bobby Duke ASB form
ASB/BD-Request For Fund Transfer	Bobby Duke ASB form
ASB/BD-Request For Purchase Order	Bobby Duke ASB form

ASB - REQUEST FOR PURCHASE ORDER

Club/Organization Name: _____ Request Date: _____

Requestor: _____

Requested from which ASB Account: _____ Amount Requested: _____

Vendor: _____ Address: _____

Rationale for Funds Requested (Include Quantity/Detail): _____

NOTE: It is MANDATORY to attach a distribution list for purchase of uniforms, t-shirt, shoes, etc.

* Click to Upload Files
CLUB MINUTES REQUIRED
You haven't uploaded any files.

Date approved by Student Council: _____

ATTN CLUB ADVISOR: Mandatory to attach student council minutes to this request.

If request is denied, please enter comments below:

ASB Clerk Only

Vendor: _____ P.O. #: _____ Actual Amt: _____ Date Paid: _____

- Please fill out all required fields of the purchase order. (*** red asterisks**)
- A detailed description of the intended purchases should be included (example: hamburger buns, patties, napkins, plates, mustard, ketchup relish, mayonnaise, and drinks.)
- Your Club Meeting Minutes will need to be uploaded to your PO request form. Per Auditors all Club Meeting Minutes must be on an appropriate Minutes Template, please see you're ASB Advisor and ask for a copy of the Template.
- **All vendors that will be coming on to campus will need to be approved by Risk Management prior to scheduled event. Per Risk Management, vendor must provide liability insurance and an endorsement letter with Coachella Valley U.S.D. and School site's name as the additional insurer with the date they are providing services.** Please see attachment from the Risk Management Office with Vendor Requirements.

PURCHASE ORDER (PO) cont.

- Now you are ready to submit your form to your ASB Advisor for approval. It will then go to your Principal for approval and lastly to the ASB Account Clerk. Once the ASB Clerk approves your P.O. it will be processed, scanned and emailed to you.
(ALL PO's may take up to a week to be approved and processed)

Now you are ready to shop:

- If you requested a purchase order from COSTCO, Food 4 Less, Home Depot, or Wal-Mart you will need to reserve the membership/credit card with your sites assigned
ASB Account Clerk: **Alma Bautista**- Elementary/Middle Schools/La Familia & West Shores H.S. **Anna Ambriz** – Desert Mirage/ Toro Canyon/ Las Palmitas **Tania Deniz** – Coachella Valley H.S.
- Your purchase cannot exceed the amount approved on your purchase order.
- Receipts should include a description of the items being purchased. If vendor does not provide itemized receipt with their logo, a handwritten receipt with company letterhead or stamp, stating the purchased items and the cost, is acceptable.

- Please **SIGN** the receipt/invoice, write the PO# and give to the ASB Account Clerk the following **business day**.

EXAMPLES OF ALLOWABLE PURCHASES

- Magazines and newspaper subscriptions for student use
- Supplemental equipment for student use that is not normally provided by the school entity
- Fieldtrips and outdoor education/science camps
- Extra-curricular athletic costs, including costs for ticket sales, game officiating and security
- Costs for student social events
- Scholarships
- Awards

PROHIBITED PURCHASES

- Equipment, supplies, forms/postage for curricular, ***classroom use*** or district business
- Repairs and maintenance of district-owned equipment
- Supplies or salaries which are the responsibility of the District
- Office Supplies for personal or classroom use of district employees including **Clorox wipes**
- Gifts, loan, credit or the purchase of accommodations for district employees or others
- Gifts of any kind **including GIFT CARDS**
- Electronics
- Contributions to charitable organizations and Donations to families/students in need
- Pay any expenses with cash from fundraisers
- Snacks or drinks for teachers/coaches meetings and Employee clothing/attire

CHECK ADVANCE/CASH ADVANCE FORM (HIGH SCHOOLS ONLY)

- **Invoice Requirement** - When requesting a check advance for payment of a fieldtrip, or a service before it has occurred, a contract or invoice needs to be obtained.
- **Cash Advance form** – You will need to submit an Authorization for Advance Form through School Stream in addition to your Purchase Order request. The form must clearly describe the reason for advance and what the payment is for. It should also clearly state the date the check is needed.

The screenshot shows a web browser window with the URL http://www.asthoted.com/CVUSD/Forms/2/Use/Forms_D. The page title is "ASB/BD - Authorization For Advance Form 8/13/2012". The form contains the following fields and sections:

- Date Submitted:** []
- Date Check Needed:** []
- I hereby authorize advance payment to:** []
- from this:** []
- in the amount of \$:** []
- for the payment of:** []
- It is necessary to pay in advance because:** []
- Check to be picked up by:** []
- name of person who will pick up check:** []
- I assume full responsibility to assure that original receipts for the purchases from the advance, refund of any overpayment, will be sent to the ASB Clerk no later than three (3) days after the purchase is made. If the check is not used within five (5) working days after date of issuance, it must be returned.**
- OFFICE USE ONLY**
- P.O. Number:** []
- Date Minutes Approved:** []
- Complete the information below to route your form. Hide Instructions**
- Please route this form to the following personnel:**
- 1. ASB Advisor**
- 2. ASB Clerk**
- Your Name:** Anna Ambroz
- Your E-mail:** aambroz@cvusd.us
- Send to Approver:** []

- **Submit Receipts** - Once the purchase or event has occurred, a receipt must be obtained and signed.
- **Extra Money** - Money not used from the check advance needs to be re-deposited into the same account and noted on the receipt within one week.

Donations

- **Approval** - Donations need to be board approved. A Donation to ASB Form must be submitted on School Stream for approval. If the donation was made by check you will need to upload a copy of the check. If you receive a cash donation per Auditors request, please collect a letter from the donor stating the cash amount of the Donation. Forward all paperwork to the school assigned ASB account clerk.

FUNDRAISERS

ASB must approve all activities that generate money. If a club has an activity without ASB approval it will be penalized 30% from their profits.

1. **Submit** – A Request for Fundraiser Approval through School Stream.

2. **Approval** – ASB Student Council will approve or deny your request. Once the meeting is adjourned, the ASB Advisor will send the approval form to the ASB Account Clerk. The ASB Account Clerk will send the petitioner the final approval for request through School Stream.
3. **Monies Verified** - Advisor or ASB Clerk is responsible for verifying money and collection report in front of person turning in money. If your counts match the Advisor will approve your Collection Report and receipt your deposit. Tally sheets must accompany collection report.
4. **Monies Received** – All monies received from the Fundraiser must be backed up with a Collection Report that you need to submit on School Stream. Print the Collection Report and original tally sheet received and take monies to the ASB Account Clerk.
5. **Profit/Loss Report** – Please make sure you take inventory of your purchased or donated items before you distribute to sell. Once your fundraiser comes to an end a profit/loss report needs to be completed. The report needs to be submitted within ten days. If a profit/loss report is not turned into the ASB Advisor/ASB Clerk, **ASB will penalize your club an additional 10% from your profit.**

Additional Information

- **Cash Payments** – **Do not pay cash from any fundraising items.** Monies should be deposited as received and purchases/payments are processed thru PO's. This will ensure a proper paper trail for the auditors. **You can not buy fundraising items with your own money and then reimburse yourself from the collected money.**
- **Bank Clearance** - Deposits must be cleared from the bank before they are updated to your account. **Note: If checks are returned from the bank, there is a \$10 fee charged to the club. The amount deposited to the club account will also be deducted.**

Carry Over Request

- **EOY Monies** – If you want to keep your unused monies in your club account you need to submit a Request to Carry Over Excess Ending Balances before the end of the school year, **ONLY CLUBS.**
- If you do not submit this form and request to have the monies put back into your account you will only be allowed to keep 20% of your ending balance.

Submit Form

Coachella Valley Unified School District
ASB/DMHS - Request to Carry Over Excess Ending Balances
8/15/2013

TO: District Business Department

FROM: (Club Name)

The following organization requests approval to carry-over an amount in excess of the 20% limit.

SCHOOL: - Select -

CLUB/ORGANIZATION:

CALCULATION OF EXCESS CARRY-OVER:

A. Total Estimated Revenue:

B. Line A x 20%:

C. Amount of carry-over requested:

D. Excess carry-over (line B minus line C):

Provide an explanation below of the need to carry-over amounts in excess of the 20% limit. Indicate the manner in which student approval was obtained, and when the club will use the excess funds.

Attach Meeting Minutes:

Complete the information below to route your form: [Hide Instructions](#)

Please route this form to the following personnel:

1. ASB Advisor
2. Principal
3. ASB Account Clerk

Your Name: Anna Ambroz Your E-mail: acambroz@cvusd.us

Send to Approver: - Select -

[Print with Advanced Options](#)

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T-Shirt Orders

- The District requires Request for Quotes (RFQ) for all T-Shirts, Shirts/Uniforms orders. Everyone will have to comply with the bidding procedures.
- The person requesting a RFQ to order T-Shirts will have to email their completed RFQ form to the Purchasing Department (Marcela Valdez) with all pertinent information.
- We urge you to plan ahead when ordering your T-Shirts. Purchasing requires that the form be emailed **4 weeks** before the date needed, to ensure that the vendors have time to submit their quotes and ASB can issue the PO.
- If you have any questions or concerns regarding the T-Shirt order procedure please contact Purchasing via email (marcelav@cvusd.us).

T-Shirt Order Procedure

From: Marcela Valdez

Subject: RFQ FORM FOR T-SHIRTS, PE UNIFORMS, ETC.

The T-shirts RFQ Form which needs to be submitted to the Purchasing Department for every purchase of T-shirts, shirts, polo shirts, PE uniforms, Etc.

IMPORTANT POINTS TO REMEMBER:

- Make sure that the form is completely filled out (**no blank areas**)
- Submit any attachments needed (pictures, logos, etc.)
- Site Administrator's signature required
- Minimum lead time is **4 weeks** from the day the form is submitted to delivery date. Please plan accordingly.
- If the order is being paid with ASB Funds, please work on getting all your ASB approvals while we work on the quote.

As always, please call if you need any assistance.

Marcela Valdez, CVUSD Purchasing Department **Phone:** (760-848-1103) **Email:** marcelav@cvusd.us

This information should serve as a guide, if there are any unanswered questions or additional information that you need please feel free to contact your sites ASB Account Clerk. .



Alma Bautista

D.O.-ASB Account Clerk
Elementary/Middle
Schools
La Familia & West Shores
H.S.
760-848-1049
Email:
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Anna Ambríz

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Tania Deníz

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