



CHARTERED STUDENT ORGANIZATION ADVISOR'S GUIDE

Purpose of a Chartered Student Organization (CSO):

- To encourage and stimulate involvement of all students.
- To assist students in developing leadership skills, professional development skills, organizational skills and management skills.
- To assist students in setting goals and the development of plans to achieve those goals.
- To encourage cooperation and teamwork.
- To contribute positively to building the CNM community.

Role of the Advisor/Sponsor:

- Make a commitment to your CSO.
- Ensure that your CSO understands and follows all CNM policies and procedures.
- Meet with your CSO regularly.
- Familiarize yourself with the goals of your CSO.
- Learn the procedures and policies pertaining to CSOs.
- Ensure that your CSO members' contributions and accomplishments are acknowledged.
- Ensure that your CSO Officers complete *all* required paperwork for purchasing, travel, meetings, events, activities and deposit of funds.

MOST IMPORTANTLY REMEMBER TO

- Advise and guide; do not dictate.
- Establish basic ground rules to help students lead themselves.
- Ensure that you are aware of and approve all CSO purchases, events, activities, and deposits.
- Hold meetings regularly and conduct those meetings in a business-like manner.
- Avoid turning individual and group student activities into advisor activities.
- Ensure that the CSO follows its mission/purpose statement.

Role CSO Advisors should not do:

- Complete paperwork as this is completed by the CSO Officer(s).
- Deviate from the CSO Mission and Purpose, as provided in the Charter Packet.
- Use CSO funds for institutional or departmental purposes



CHARTERED STUDENT ORGANIZATION TERMS & DEFINITIONS

CSO Advisor: A CNM employee (faculty or staff) who will oversee the CSO and ensure that the CSO operates within the guidelines, policies and/or procedures set forth by the Office of the Dean of Students and the Student Activities Office.

CSO Officer: A CNM student who will have accepted the role as a President, Vice-President, Secretary or Treasurer; will fulfill the roles/duties as described within the CSO constitutional governing documents or bylaws. In addition, the said officer will ensure that the CSO operates within the guidelines, policies and/or procedures set forth by the Office of the Dean of Students and the Student Activities Office.

CSO Mission/Purpose: is a statement provided along with the CSO charter packet. This statement indicates the direction that the CSO will operate.

Student Account (1010): Account which contains funds that have been allocated to the CSO from the Student Allocation Board. These funds are from a portion of student fees paid by each registered student.

Agency 8001 Account: Account which contains funds received through a fundraising project, membership dues or approved donations. Donations must be cleared by the Student Activities Office before they can be solicited.

Price Quote Forms: Internal Student Activities document which is used to obtain quotes for items or services to be purchased (please refer to section 7, page 33, of this manual).

Purchase Order (PO) or Department Purchase Order (DPO): A form that is issued to the vendor which authorizes the purchase and assures the vendor that payment will be made to them by CNM for the purchase of goods or services. The timeline of payment is 30 days after goods were received or services were rendered.

Purchase Requisition: A CNM form used to identify the goods or services a department or CSO wishes to acquire and serves to initiate the purchasing process.

Vendor: An individual, group or corporation providing a product or service.

CSO Event/Activity: CSO sponsored event/activity benefiting CSO members, non-members and the CNM community.

CSO Meeting: is when the CSO meets to discuss official CSO business.

Official CSO Business: making decisions that affects the CSO mission/purpose statement, functions and operations.



CHARTERED STUDENT ORGANIZATION FUNDING PROCESS

General Information

The CNM Governing Board has established very general guidelines for funding of a Chartered Student Organization (CSO). These guidelines are found in the CNM Source. The Governing Board has approved \$2.00 from each registration fee to be set aside to support activities for students; the Budget Office administers the funds. A Student Allocation Board has been selected to distribute funds to a CSO and they have established more specific rules and regulations for expenditures (please refer to section 6 of this manual). The Dean of Students is the control agent for all funds and can approve or deny any purchase request.

General Notes

CSOs at CNM are funded in a variety of ways: fundraising, student fees, and donations. The CSO generally works with two separate accounts. A 1010 Account and an Agency 8001 Account.

- All CSOs that receive a full charter are issued a 1010 account number and will receive an allotment of money as per the Student Allocation Board Guidelines.
- CSOs that plan to do fundraising must request to open an Agency 8001 Account. An Agency 8001 Account is only set up by a written request (e-mail or memo) from the advisor to the Student Activities Coordinator.

CSOs that are fully chartered are eligible for funding, use of CNM facilities and equipment, use of CNM Logo (approval by the Marketing and Communication Office is required), use of bulletin boards and all Duplicating and Postal Center (DPC) services.

Funds collected from student fees are distributed by the Student Allocation Board. This board is made up of CNM students who develop and administer guidelines for how this money may be spent and also determines how much will be allotted to each organization for projects, activities, or training (please refer to section 6 of this manual).

CSOs who plan to earn money through fundraising or contributions from local organizations need to be aware of the guidelines regarding these processes found in the fundraising rules and regulations. Information can be obtained from the Student Activities Office at (505) 224-3238.

Expenditures from either 1010 or Agency 8001 Accounts must be supported and approved by the CSO Advisor. Any CSO who fails to do this may subject their organization to potential disciplinary action.

The Dean of Students is the "control agent" for expenditures out of both 1010 account and Agency 8001 Account. All paperwork regarding expenditures must be approved and signed by the Dean of Students who expects all requests to meet established timelines, CNM policy and procedure, and to be submitted on proper CNM forms. Expenditure request(s) not meeting the above criteria may be delayed or may not be approved.



CHARTERED STUDENT ORGANIZATION ACCOUNTS

CSO General Account (1010)

Two (\$2) dollars of each registration fee is set aside to support activities for students for CSOs. Currently, once a CSO is fully chartered, it receives \$750.00 in the fall semester and \$750.00 in the spring semester. To obtain additional funds, each CSO must submit the Application for Additional Funds Form to the Student Allocation Board (please refer to page 26 of this manual). The Student Allocation Board will review the application and determine the amount to be awarded. The Student Allocation Board is also responsible for establishing rules and regulations for the expenditure of these funds. The Purchase Request process must be done through the Student Activities Office, please refer to section 3 of this manual.

- Excerpt from the Student Allocation Board Guidelines: “Allocated (1010) monies shall not be used to purchase items for use in raising funds for the organizations.”
 - Examples include purchasing items for resale or raffle. Monies cannot be used for sponsoring a performance/event and then charging admission.

Agency 8001 Account

These accounts are used for funds that are generated by each individual CSO through fundraisers or approved donations. There is a variety of ways CSOs can raise funds. Be advised that funds earned must be immediately deposited (within one (1) business day) into this account through the Student Activities Office at Main Campus. Please keep in mind that you may make special accommodations with the Student Activities Office for deposits after 5:00pm.

To open an Agency 8001 Account, the CSO Advisor will need to submit a written request by e-mail or memo submitted to the Student Activities Coordinator. It is the responsibility of the CSO Advisor and the CSO Officer Team to maintain an accurate account balance. If you need additional account information, contact the Student Activities Office. Please be aware that account balances obtained from the Student Activities Office may not reflect recent purchases, you must also “keep your books current” within your organization.

All purchases will be coordinated and made through the Student Activities Office and must be approved by the Dean of Students’ Office.

The General 1010 Account 1010 and the Agency 8001 Accounts are managed by the Student Activities Office and are the only operational accounts used for CSO business.



CHARTERED STUDENT ORGANIZATION Excerpted from the Student Allocation Board Guidelines

GUIDELINES FOR EXPENDITURES OF STUDENT FEE (1010) ALLOCATIONS FOR CHARTERED STUDENT ORGANIZATIONS

The following expenditures have been defined by the Student Allocation Board as non-allowable expenses:

- A. Scholarships
- B. Items for individual personal use such as clothing, uniforms, electronics, prizes or gifts (non-monetary recognition items such as certificates are allowable)
- C. Furniture
- D. Partisan or political activities and/or materials (e.g. electioneering or lobbying)
- E. Religious or devotional articles or activities (shrines, tracts, etc.)
- F. Allocated (1010) monies shall not be used to purchase items for use in raising funds for the organizations.
- G. Allocated (1010) monies should not be used to pay for any faculty/staff member other than the official advisor(s). However, in case of travel, if the student group traveling exceeds 15 students to one advisor, then funds for a second advisor can be requested.
- H. If a student organization is requesting money for or planning to spend allocated funds for a permanent item (such as a bulletin board, sports equipment, etc.), a written plan must be submitted that details where the items/equipment will be stored, how it will be checked out/in or used, and what will happen with the item/equipment if the CSO dissolves.
- I. 1010 funds may not be used to purchase gifts for any person(s). However, they may be compensated for their time by following the purchase request process as notated in the manual in section seven (7).

**For more information, forms and guidelines
Please refer to the Student Allocation section 6 of this Manual.**



CHARTERED STUDENT ORGANIZATION PURCHASING PROCEDURES

Overview of Purchasing Process

In order to make a purchase using CSO funds, there are several steps which are to be followed. These steps are necessary for CNM to be in compliance with laws & procurement regulations of the State of New Mexico. CNM has certain procedures and policies in place that legally must be followed; these are part of the official "procurement process." As CSOs utilize funds from both 1010 account and from the Agency 8001 Account, there are specific restrictions regarding what can be purchased; the CNM processes for making a purchase must be followed. This section has been put together to help you understand that process and to make that process as easy as possible for you.

Generally, making a purchase requires **three primary steps**:

- (1) What has to be done before the purchase request can be initiated?
- (2) The completion of the paperwork needed to initiate a purchase.
- (3) The follow-up which ensures that the vendor will be paid.

These steps have been outlined in order for you below so that you will know exactly what needs to be done and when.

The most important things you need to know about making a purchase include the following:

1. Under no circumstances may arrangements be made for a purchase (an order placed, room reserved, contract signed, purchase agreements made, etc.) until the purchase has been fully and officially approved and the appropriate paperwork is generated and approved by all approving offices.
2. Under no circumstances may a student or advisor purchase something with private funds. In the event of an emergency, "Out-of-Pocket" reimbursement will need prior approval. No approval = no reimbursement.
3. There are separate instructions regarding travel-related purchases (please refer to section 5 of this manual). The guidelines and regulations for travel-related purchases are different than for other purchases. Please check these before initiating any travel activities and receive assistance from the Travel Coordinator (LisaMarie Dorian) in the Office of the Dean of Students.



CHARTERED STUDENT ORGANIZATION

Initiating a Purchase Request

Please follow these steps carefully and completely to ensure that the purchase can be made without possible delays. The purchase process may take up to two (2) weeks to complete, please plan well.

1. In order to initiate a purchase you will need 1) a price quote from the vendor, 2) CSO Advisor approval.

All items needed to initiate a purchase must be submitted to the Student Activities Office. All purchase requests will be processed only on Tuesdays and Thursdays. The purchasing process may take longer if there are complications with vendors, items ordered or if there are errors on the CNM Price Quote Form or on the vendor price quote. It is highly recommended that you order far in advance any item(s) that you will be using for a CSO sponsored event/activity to ensure that they are received on time. No items can be delivered to personal addresses. Decide exactly what it is you would like to purchase and what vendor(s) may have the items/service available. Make sure the item(s) you wish to purchase falls within applicable guidelines.

NOTE: If you are hoping to purchase an item that is considered equipment (or some other permanent item) be advised that some of these items can only be purchased with "agency" funds (8001) (please refer to page 26 of this manual for acceptable purchases). A permanent Item Purchase Request Form must be completed and submitted with other purchase information; please contact the Student Activities Office for more information.

2. Ask vendor(s) if they will accept a CNM Department Purchase Order (DPO) or Purchase Order (PO) for the purchase. The vendor(s) will be paid within 30 days that the goods were received or services were rendered.
3. You will need a price quote for the exact item(s) and dollar amount that you would like to purchase, submitted in writing from the vendor. Once you obtain the price quote from the vendor, please fill out the CNM Price Quote Form completely (please refer to page 33 of this manual) and attach the vendor price quote form. There should not be any sales tax for goods to be purchased since CNM is tax exempt. The tax certificate will be sent to the vendor after appropriate paperwork is submitted to the Student Activities Office.
4. In addition, you will need to make sure you have **completely** filled out the CNM Price Quote Form in order for the form to be processed by the Student Activities Office.
5. Once all of the proper paper work is completely filled out, please submit the purchase request package needed to initiate a purchase (price quote, advisor approval, No Purchase Order Statement and/or Permanent Item Purchase Request Form (including any relevant fees needed) to Student Activities Office.



CHARTERED STUDENT ORGANIZATION

Check List of Information needed to initiate a purchase:

- ✓ CSO Price Quote Form (including item description, cost for each item, quantity of each item, total costs per item, including any relevant fees, and grand total for the purchase)
- ✓ Appropriate Signatures (CSO Officer who obtained the price quote(s) and CSO Advisor acknowledging of and approving the purchase request)
- ✓ Required information for submission of a Purchase Request(s):
 - Vendor name, address, phone number, and contact person.
 - CSO name and contact information for the officer obtaining the vendor price quote.
 - Event or activity for which the item(s)/service(s) is being purchased for and date when the item(s)/service(s) is needed.
 - Whether you plan to pick up the item(s) or plan to make arrangements to have it delivered to CNM (if delivery, you will need to indicate this on the CNM Price Quote Form, to allow proper notification to CNM Shipping and Receiving that the order will be in transit)
 - **NOTE:** Deliveries can only be made to the CNM Main Campus.



CHARTERED STUDENT ORGANIZATION COMPLETING THE PURCHASE

This section will help you understand what needs to be done after you pick up your Department Purchase Order (DPO) or Purchase Order (PO) from the Student Activities Office and to ensure the purchase is completed and that the vendor will be paid accordingly.

1. Take the DPO or PO with you to obtain your item(s) or to have service(s) rendered. You *must* give the DPO or PO to the vendor in exchange for your item(s) or service(s). You may only obtain items as they are listed on the DPO or PO - no quantity or cost increases, item substitutions, or new items are allowed. Violation of the purchasing policy and procedure may result in disciplinary action against the CSO, officer, and/or advisor.
2. The vendor will provide you with your original cash register receipt and/or an original invoice, which needs to have reference of the DPO or PO Number. These items will need to be returned immediately to the Student Activities Office no later than one (1) business day after item(s) are received or service(s) were rendered. The original vendor receipt and/or invoice **must be** itemized and accurately reflect the total cost of that on the DPO or PO. Returning the invoice beyond the required date, may result in future purchases not being approved by the Dean of Students.

NOTE: The Vendor cannot be paid if these items are not submitted. Invoices submitted without a DPO or PO Number may result in immediate disciplinary action. The cash register receipt and/or invoice should be dated for the same day that item(s) were received or service(s) were rendered.

3. After the receipt and/or invoice are returned to the Student Activities Office confirming the purchase, the office will clear the purchase for payment. The Business Office will then pay the vendor and the amount will be deducted from the CSO's account balance. This amount should be added to the appropriate budget report to have a running and accurate account balance.

Remember: Department Purchase Order or Purchase Order first. Do not order or purchase anything until one of the above has been issued.



CHARTERED STUDENT ORGANIZATION PURCHASING WORKSHEET

PRICE QUOTE (Should NOT be an invoice, MUST SAY "Price Quote" "Sales Estimate")

- ___ Item Description
- ___ Quantity per item
- ___ Cost per item
- ___ Total amount per item
- ___ Grand total of purchase
- ___ Reason/Purpose of purchase

VENDOR INFORMATION

- ___ Vendor Name
- ___ Vendor Address
- ___ Vendor Contact Person
- ___ Vendor Phone Number

ADDITIONAL INFORMATION

- ___ Name of CSO requesting purchase
- ___ Contact information for CSO Officer coordinating the purchase
- ___ Event or Activity for which item/service is being purchased
- ___ Date of when item/service is needed
- ___ Pick up or Delivery
- ___ Cost Account (1010 or 8001) being used

ONLY IF NEEDED

- ___ Letter from vendor stating that they do not except CNM DPO's
- ___ Completed CSO PRICE QUOTE FORM

ADVISOR APPROVAL

- ___ Has the CSO Advisor signed all required forms?
- ___ Submit all purchase request forms to the Student Activities Office

For questions, please contact the Student Activities Office by stopping by one (1) of the following locations:

1. Main Campus, Student Services Center (SSC) room 109 or by calling (505) 224-3238
2. Montoya Campus, Tom Wiley Hall (TW) 207 or by calling (505) 224-5546
3. Westside Campus, WS II room 104
 - a. By e-mailing samail@cnm.edu



CHARTERED STUDENT ORGANIZATION ACTIVITY SCHEDULING PROCEDURE

To ensure that your event/activity runs well and that you have all of the necessary support to accomplish your CSO purposes, begin the planning and implementation process for all events at least **four (4) weeks early**. *This will include submitting the appropriate documents to the Student Activities Office. Also, if your event, activity and/or meeting need a service or goods to support the function, please submit the appropriate purchase request documents.*

The following procedure applies to all CSOs.

1. CSO Advisors/Officers must complete required forms and other documentation (please refer to pages 31 and 32 of this manual) with the requested date and location to the Student Activities Office.
2. The Student Activities Coordinator reviews the request, assesses the type of event/activity, and notifies the CSO of approval and/or if any other forms will be required.
3. For CSO activities (meetings, small events, etc.) the appropriate forms must be completed (please refer to section 7 of this manual).
4. For all CSO meetings, events and activities, the Activity Planning Form *must* be completed along with a Facility Usage Form (FUF) form, if applicable, (please refer to section 7 of this manual).
5. All media equipment **must** be reserved and checked out by the CSO Advisor. The CSO is responsible for all equipment. In the case of special needs, it is the responsibility of the CSO Advisor to contact the appropriate CNM department/personnel (for example, Instructional Medial Resources for Audio and Visual needs or Facilities for custodial needs) **after** the advisor receives notice that the event/activity has been approved.

SPECIAL NOTE TO ADVISORS: When Security Officers are paid overtime to cover an event, the CSO sponsoring the event is responsible for paying any overtime.



CHARTERED STUDENT ORGANIZATION BULLETIN BOARDS

The Student Activities Office is responsible for the two (2) bulletin boards located in the Student Services Center (SSC) at Main Campus. These bulletin boards are located:

1. 1st floor of Student Services Center by the elevators
2. 2nd floor of Student Services Center East wall

All materials requested to be posted, should be taken to the Student Activities Office, in the Student Services Center (SSC) room 109, at Main Campus for proper distribution. We can also have the item(s) delivered to other campuses if asked to do so.

The following are rules for using the bulletin boards:

1. The bulletin boards are cleared of all postings on the 1st and 3rd Fridays of each month.
2. No obscene flyers can be posted.
3. Bulletin boards are available for CSOs as long as rules are obeyed.
4. New items being posted must not obscure previously posted items.
5. There should be no duplicates posted on the same bulletin board.

In addition, the Student Activities Office maintains several bulletin cases primarily for the use of CSOs. There are two (2) glass cases at the Main Campus, one (1) at the Montoya Campus, one (1) at the Westside Campus and one (1) at the South Valley Campus. Materials *must* be submitted to the Student Activities Office, at main campus, for approval. The Students Activities staff will distribute the items to the appropriate places for posting.

- Items are not to be posted on windows, doors, or walls. Any CSO who violates this policy may subject their organization to potential disciplinary action.
- CSOs requesting to post on bulletin boards not managed by the Student Activities Office, will need to obtain the proper approval to do so by the nearest administrative office that manages the bulletin board(s), i.e. for the bulletin board in the commons area in the Smith Brasher Building (SB) you will need to go to SB-103 for proper approvals.



CHARTERED STUDENT ORGANIZATION EVENT PLANNING WORKSHEET

NAME OF EVENT/ACTIVITY: _____

DATE: _____

PLACE: _____

TIME: _____

PERSON IN CHARGE: _____

LOCATION

____ Room/Building/Facility to be reserved _____

____ If needed, appropriate Audio and/or Visual Equipment has been reserved by CSO Advisor?

____ Room set up and all equipment needed has been discussed with appropriate person?

- If desks and chairs were rearranged, these items will need to be put back as they originally were **prior** to the CSO meeting/event/activity.

BUDGET

____ Does the CSO have money to support event?

____ Will 1010 or Agency 8001 Account be used?

____ Has a vendor price quote been completed within appropriate deadlines?

____ Have you obtained the white copy of the DPO to provide to the vendor on the day of service?

FOOD

____ Are you having food?

____ Have you filled out the appropriate forms?

____ Has the food been ordered?

EQUIPMENT

____ Sound

____ Has Audio and Visual Equipment been reserved by CSO Advisor?



CHARTERED STUDENT ORGANIZATION EVENT PLANNING WORKSHEET (continued from previous page)

PERFORMERS

- ☐ Has the artist/guest been contacted at least a week prior to event?
- ☐ Have travel arrangements been finalized and confirmed?
- ☐ Have hospitality needs been arranged for?
- ☐ Has arrival time to campus been verified?
- ☐ Have sound requirements been confirmed?

FACILITIES

- ☐ Has the Facilities Usage Form (FUF) been filled out?
- ☐ Has approval for use of specific space been obtained?
- ☐ Is there a need to have Campus Security present during the event/activity?
- ☐ Is electricity needed, if outside, during the event/activity?
- ☐ Are restrooms needed during the event/activity?

PUBLICITY

- ☐ Flyers
- ☐ Web Site
- ☐ Posters
- ☐ Main Campus
- ☐ Montoya Campus
- ☐ South Valley Campus
- ☐ Rio Rancho Campus
- ☐ Westside Campus

For questions, please contact the Student Activities Office by stopping by one (1) of the following locations:

- 1. Main Campus, Student Services Center (SSC) room 109 or by calling (505) 224-3238**
- 2. Montoya Campus, Tom Wiley Hall (TW) 207 or by calling (505) 224-5546**
- 3. Westside Campus, WS II room 104**
 - a. By e-mailing samail@cnm.edu**



CHARTERED STUDENT ORGANIZATION

Advisor Checklist-Submission of Student Travel Form

As a Chartered Student Organizations Advisor planning on traveling with a Chartered Student Organizations, please follow this checklist as it will assist you with what travel forms you will need to fill out and submit to the Student Activities office at the Main Campus room SSC109.

- ☐ Read over the **Student Travel Advisor Checklist**—check off the item as you complete it
- ☐ Fill out the **Pre-Approval Request for Travel Form** and sign at the bottom of the form
- ☐ Fill out the **Office of the Dean of Students Student Travel Information and Summary Form**
- ☐ Fill out the **Transportation Information Form**—sign and date at the bottom of the form
- ☐ Fill out the **Activity Waiver Release Form**—sign and date at the bottom of the form
 - ☐ Each student /Advisor traveling must fill this form out
 - ☐ Collect this form from all students traveling
- ☐ Fill out the **Medical Information Form**
 - ☐ Each student/Advisor traveling must fill this form out
 - ☐ Collect this form from all students traveling
- ☐ Fill out the **Advisor/Student Traveler Letter of Agreement Form**
 - ☐ Each student/Advisor traveling must fill this form out
 - ☐ Collect this form from all students traveling

All forms must be completely filled out and submitted *SIX WEEKS* prior to the travel date to the Student Activities Office at the Main Campus room SSC109 before the Office of the Dean of Students Travel Coordinator will accept them.

Note: Failure to submit forms within appropriate time frames may result in non-approval from the Office of the Dean of Students.



CHARTERED STUDENT ORGANIZATION

Student Travel Advisor Checklist

As a Chartered Student Organizations Advisor planning on traveling with Chartered Student Organizations, this checklist has been provided to assist you with the various steps involved in preparation of your travel. All travel arrangements must be initiated **a minimum of six weeks** prior to the event. Please refer to the *Advisor Training Manual* and *The Source* for additional information regarding the student travel process. All student travel must be submitted **a minimum of six weeks** prior to event to prevent late fees, high airfares and other costs associated with delayed travel arrangements. Travel requests within the **six week** time frame may not be approved.

- 1. Verify that funds are available in your Chartered Student Organization budget (Student Activities Office can assist you with this). If funds are not currently available, submit appropriate request for funding through the Student Allocation Board or other funding source. Please pay attention to Student Allocation Board deadline dates as this group only approves funding eight times during the academic year.
- 2. Gather information and supporting documentation about activity, conference, competition, etc., if you haven't already done so.
 - Conference information and agenda
 - Conference Registration form
 - Lodging information, including hotel name, contact, and room rates.
- 3. Determine method of transportation and gather/complete related documents as indicated below:
 - Air- arrangements are made by Office of the Dean of Students Travel Coordinator (224-4342) using a contracted travel agency.
 - CNM Vehicle - contact Office of the Dean of Students Travel Coordinator (224-4342) to complete the driver eligibility and vehicle checkout process.
 - Personal vehicle - complete applicable Driver Eligibility forms and return to the Office of the Dean of Students Travel Coordinator (224-4342).
- 4. Complete the Student Travel Information form which summarizes who, what, when, where and why for the travel. Consult with the Office of the Dean of Students Travel Coordinator (224-4342) if you have questions. This form must be presented **six weeks** prior to the date of travel.
- 5. Have each student who will be traveling complete an Activity Waiver Release and Medical Information form. Make a copy of each completed waiver to take on the trip (so you have the medical release information for the students). Submit the originals to the Student Activities Office in SSC109. Students must complete these forms and must be returned to the Student Activities Office when the Student Travel Packet is turned in **six weeks** prior to the travel date.
- 6. Submit completed forms (from steps 4 and 5) to the Student Activities Office along with all the applicable accompanying documents indicated in steps 2 and/or 3 at least **six weeks** prior to planned travel.
- 7. Follow through with and be available to the Office of the Dean of Students Travel Coordinator in SSC 202 as travel arrangements are being made and purchase requisitions are being completed. Travel Coordinators make the actual travel arrangements and complete the necessary purchase requisitions.
- 8. Schedule an appointment to review and approve your Travel Packet with the Office of the Dean of Students Travel Coordinator (SSC202) before it is submitted for approval.

- 9. It will be the responsibility of the advisor to obtain travel and other necessary documents from the Office of the Dean of Students Travel Coordinator in SSC 202 before traveling (confirmation numbers, itineraries, PO numbers, etc.).
- 10. Take a copy of the following travel documents with you on your trip, but also leave a copy with your department and/or provide a copy to other advisor(s) traveling with your group:
 - Student Activity Waiver for each student traveling
 - Hotel and activity information (conference registration/schedule, confirmation numbers, etc.)
 - Rental car information (if applicable). NOTE: CNM does not reimburse for additional car rental insurance.
 - Driver Eligibility forms (if applicable)
 - CNM Emergency Information Card. Call immediately if an accident occurs or if additional expenses need to be approved. Call the Office of the Dean of Students at 224-4342 for emergencies regarding student situations and additional expenses needing approval. Approvals will be provided based on situation.

Requirements for All Travel Request/Trips

1. Chartered Student Organizations Advisor or designee must accompany students on all trips.
2. Travel paperwork must be submitted within required timelines or travel will not be approved.
3. All students and advisors traveling must complete the letter of agreement indicating that they are available to travel and any cancellation of the trip (only exceptions allowed are those as cited in the CNM Source – Travel section) will result in student and or advisor having to pay CNM any fees charged by the hotel, conference or airline for cancellation.
4. Students and advisor must submit **itemized travel receipts** to the Office of the Dean of Students Travel Coordinator in SSC202 no later than **five business days** after returning from trip.
5. Students are required to adhere to the Student Code of Conduct. Advisors are required to adhere to CNM guideline as applied to employees who travel on CNM business.
6. Students will be required to submit to the Office of the Dean of Students a brief report listing what they have learned and how they will apply the knowledge to their Chartered Student Organizations. Format for report can be requested from the Office of the Dean of Students as the Student Travel Report Form.
7. Family members may not travel with CNM Student or advisors for any CNM sponsored trips.
8. Student(s)/Advisor(s) requesting to drive rental or personal vehicles must provide proof of current insurance and a valid driver license for all person(s) being identified to drive. Information will be provided prior to the planned trip.



**PRE-APPROVAL
REQUEST FOR TRAVEL (Only for the advisor to fill out)**

Person Requesting Travel:	
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Reason for Travel:

How Travel Supports Strategic Direction:

Funding Source:

APPROVED:

Supervisor

Control Agent (if different than supervisor)

Vice President

NOTE TO TRAVELER: Submit conference/event materials with this form for travel consideration



CHARTERED STUDENT ORGANIZATION Student Travel Information and Summary Form

[Please use Word process, type or print neatly]

GENERAL INFORMATION

Chartered Student Organization: _____
Name of Advisor: _____ Phone #/email: _____
Name of Workshop/Conference/Competition: _____
Location of Workshop/Conference/Competition: _____
Dates of Workshop/Conference/Competition: _____
Date of Departure: _____ Preferred Time of Departure: _____
Date of Return: _____ Preferred Time of Return: _____
If travel dates do not correspond with workshop/conference/competition, please explain:

What account number should be used to pay for registration? 1010 Acct ☐ Agency Acct. ☐ Other ☐:

TRAVELER INFORMATION

List of Students Traveling:

STUDENT NAME	STUDENT ID #	STUDENT PHONE #	STUDENT EMAIL

[Attach additional student information if more than six students traveling.]

Will one or more advisors be traveling with these students? YES ☐ NO ☐

List of advisor(s) who will be traveling (if applicable)

Advisor Name **Advisor ID#** **Advisor Telephone #** **Advisor Email**

1. _____
2. _____



CHARTERED STUDENT ORGANIZATION
TRANSPORTATION INFORMATION

Mode of Travel:

Airplane ☐ Rental Vehicle ☐ Charter Bus ☐ CNM Vehicle ☐ Personal Vehicle ☐ Other ☐

Please explain as necessary: _____

Will all travelers be traveling together? YES ☐ NO ☐

If not, please explain: _____

What account number should be used to pay for mode of travel? 1010 Acct. ☐ Agency Acct. ☐ Other ☐

MEAL INFORMATION:

How will meals be handled for this trip?

Students on their own ☐ _____ Students will be reimbursed ☐ _____ Other ☐ _____

What account number should be used to pay for meals? 1010 Acct. ☐ Agency Acct. ☐ Other ☐

ACCOMMODATION INFORMATION

Planned Accommodations: hotel/motel ☐ private home ☐ Other ☐ _____

Will all travelers be staying at the same accommodation? YES ☐ NO ☐

If not, please explain: _____

Name/Address/Phone # for Hotel or Private Home: _____

Whose credit card(s) will be used to pay for the room(s)? A credit card maybe required upon hotel check in.

What is the per room/per night cost for the hotel? _____

How many rooms were reserved? _____ How many people will be staying in each room? _____

How do you plan to pay for rooms?

Credit Card & Reimbursement ☐ Pay in Advance (80%) by CNM ☐

What account number should be used to pay for hotel? 1010 Acct. ☐ Agency Acct. ☐ Other ☐

Please list roommate assignments (by name) below:

STUDENT/ADVISOR NAMES

Room 1 _____ and _____

Room 2 _____ and _____

Room 3 _____ and _____

Room 4 _____ and _____

APPROVALS:

Advisor: _____

Date: _____

Dean of Students: _____

Date: _____

Other as Appropriate: _____

Date: _____

(e.g. – Instructional Dean if Division Funds Will Be Used)

If personal or rental vehicle being used is all required information attached



CHARTERED STUDENT ORGANIZATION
Off Campus (In City)
Student Travel Information and Summary Form
[Please use MS Word process, type or print neatly]

GENERAL INFORMATION

Chartered Student Organization: _____
Name of Advisor: _____ Phone #/email: _____
Name of Workshop/Conference/Competition: _____
Location of Workshop/Conference/Competition: _____
Dates of Workshop/Conference/Competition: _____
Date of Departure: _____ Preferred Time of Departure: _____
Date of Return: _____ Preferred Time of Return: _____
If travel dates do not correspond with workshop/conference/competition, please explain: _____

What account number should be used to pay for registration? 1010 Acct ☐ Agency Acct. ☐ Other ☐:

TRAVELER INFORMATION

List of Students Traveling:

STUDENT NAME	STUDENT ID #	STUDENT PHONE #	STUDENT EMAIL

[Attach additional student information if more than six students traveling.]

Will one or more advisors be traveling with these students? YES ☐ NO ☐

List of advisor(s) who will be traveling (if applicable)

Advisor Name **Advisor ID#** **Advisor Telephone #** **Advisor Email**

1. _____
2. _____

APPROVALS

Advisor: _____ Date: _____

Dean of Students: _____ Date: _____

Other as Appropriate: _____ Date: _____

(e.g. – Instructional Dean if Division Funds Will Be Used)

If personal or rental vehicle being used is all required information attached?



CHARTERED STUDENT ORGANIZATION
Activity Waiver Release

Trip Information

Student Name: _____

Destination: _____ Time/dates: _____

Meeting Place: _____

Meeting Time: _____ Return Date: _____

I, _____, understand that I am traveling to _____

and that the chartered student organization/academic division _____

is paying for _____ and I will be paying for _____.

*I understand that I must be aware of and abide by the travel rules and regulations regarding the submission of required travel documents and/or receipts necessary for any reimbursements. *I also understand that while traveling to and attending CNM Sponsored activities, that I am bound to adhere to CNM's Student Code of Conduct.

Student Signature

Date

Release, Waiver of Liability and Covenant Not to Sue

The undersigned party hereby acknowledges that participation in CNM sponsored activities may involve potential risk of physical injury and assumes all such risks. The undersigned hereby agrees that the sole consideration of Central New Mexico Community College allowing the undersigned to participate in voluntary CNM sponsored activities and, in connection therewith, making available to the undersigned for his/her use while participating in such activities, certain equipment, facilities, grounds, or personnel of the Institute, the undersigned participant does hereby waive liability, release and forever discharge the Central New Mexico Community College Governing Board, its demands, rights and causes of action of whatever kind or nature, arising out of all known and unknown, foreseen and unforeseen bodily and personal injuries, damage to property, and the consequences thereof, including death, resulting from my voluntary participation in or in any way connected with CNM sponsored programs and activities.

I further covenant and agree that for the consideration stated above, I will not sue the Central New Mexico Community College, its Governing Board, or any agent or employee thereof, shall not constitute a waiver, in whole or in part, of sovereign or official immunity by said Board, its members, officers, agents, and employees.

Further, I understand that this release, waiver of liability and covenant not to sue shall be effective during the entire period of my enrollment or employment at the Institute.

I certify that I am ____ years of age and suffering under no legal disabilities and that I have read the above carefully before signing.

This _____ day of _____, 20____ Student I.D. # _____

Print Name _____

Student Signature

Parent/Legal Guardian (if student is a minor)

Date



CHARTERED STUDENT ORGANIZATION

Medical Information

Name: _____

Address: _____ Telephone: _____

Medical Insurance Carrier: _____ Policy Number: _____

Address: _____ Telephone: _____

In the event of illness, accident, or emergency, please notify:

Name: _____ Relationship: _____

Address: _____ Telephone: _____

In the event of illness or injury, I do hereby consent to whatever medical treatment or hospital care is necessary from a licensed physician and/or surgeon to protect my safety and welfare. It is understood that the resulting expenses will be the responsibility of the participant.

Participant Name: _____

Participant Signature: _____ Date: _____

If student is under the age of 18, a parent or guardian must sign below for permission for the student to receive medical treatment, if necessary.

Parent/Legal Guardian (if student is a minor)

Date

Additional information about any special medical conditions you may have is optional, but may be helpful. Please note this information below. Use the back of this sheet if additional space is needed. This information will remain confidential.



CHARTERED STUDENT ORGANIZATION

Advisor/Student Traveler Letter of Agreement Form

I _____ (print name) understand that I have agreed to travel with _____ (Chartered Student Organization name) to _____ (workshop/conference/event name) on _____ (dates of workshop/conference/event name). I understand that it is my responsibility to clear my travel dates with my employer, family and instructors at CNM. I understand that I am responsible for all charges incurred should I cancel this trip for personal reasons that do not involve a life crisis; I am responsible for loss of funds to the College. Such fees could include any or all of the following:

- Conference registration fee
- Travel Agency fee for cancellation
- Airfare
- Hotel – one night stay or portion thereof

Advisor / Student Traveler Signature:

Date:



CHARTERED STUDENT ORGANIZATION

Student Travel Report

Students who travel Out-of-City off Campus to conferences, workshops, seminars or other events are required to complete this report and return it to the Office of the Dean of Students no later than **five business days** after the event is attended. The report provides for documentation on student attendance and the benefits to CNM and/or the Chartered Student Organization. Failure to complete the report may result in your or the Chartered Student Organization's ability to travel in the future.

Please answer the following questions in as much detail as possible. Preference would be to complete the report in a MS Word format.

1. Based on your proposal for travel and the information you provided regarding the need to attend this event, did it accomplish what it was intended to do (If yes or no explain)?
2. Please describe how travel to this event benefited you, your Chartered Student Organizations, and CNM.
3. Please describe the workshops and or seminars you attended. If it was a single event please describe (attach copies of workshop/seminar descriptor).



CHARTERED STUDENT ORGANIZATION

Excerpted from the Student Allocation Board Guidelines

Revised February 27, 2009

I. PROCESS FOR CHARTERED STUDENT ORGANIZATIONS TO REQUEST ALLOCATED FUNDS:

A. Automatic Allotment

- ◆ Each fiscal year every CSO receiving their “chartered” status for the upcoming year will receive an automatic \$500.00 allotment per Fall and Spring semesters.
- ◆ If any allotted funds are remaining at the end of that allotment period, these funds will revert back to the general expenditures account for redistribution.
- ◆ This automatic award does not apply to organizations receiving an on-going automatic annual percentage of the total student fee amount (i.e. CNM student newspaper, SkillsUSA, Student Allocation Board, and CNM Executive Council of Students).

B. Supplemental Allotment

- ◆ CSOs that have been approved for chartering may request supplemental student fee allocation(s) in addition to the automatic allotment by submitting the appropriate paperwork within the defined time period.
- ◆ This supplemental allotment does not apply to organizations receiving an on-going automatic annual percentage of the total student fee amount (i.e. CNM student newspaper, SkillsUSA, Student Allocation Board, and CNM Executive Council of Students).
- ◆ Any student publication or student governance organization may not request supplemental student fee allocation(s) in addition to the guaranteed allotment they receive annually by submitting the appropriate paperwork within the defined time period.

C. Monetary Transaction Process

- ◆ All requests by the Student Allocation Board must be approved by the Dean of Students or designee prior to being submitted to the Budget Office for money transfers necessary to support the decisions made by the Board.



CHARTERED STUDENT ORGANIZATION

II. PRIORITIES/CRITERIA FOR FUND DISTRIBUTION TO CHARTERED ORGANIZATIONS:

- A. Evidence of fund raising activities planned and carried out as part of the efforts to fund organizational activities.
- B. Number of students who will benefit from this activity/purchase.
- C. What benefit/impact this activity/purchase will have on students.
- D. Allocation requests and spending history show evidence of efficiency and accountability.
- E. Student organization goals and fiscal needs are presented clearly and completely.
- F. Requests are in line with the Allocation Board Guidelines for Expenditures.



CHARTERED STUDENT ORGANIZATION

Student Allocation Committee Schedule for Requests and Meetings

All Chartered Student Organizations (CSOs) requesting additional funding from the Student Allocation Board Committee *must* complete the following:

- a. Complete the proper Student Allocation Request forms, located in section five (5) pages 28-29.
- b. Return Student Allocation forms to Student Activities Office for review and finalization.
- c. Student Allocation Board Committee will then discuss and vote.
- d. Student Allocation Board Committee will notify the Student Activities Office with a final decision, followed by notification from the Student Allocation Board Advisor on decision.

Student Allocation Committee Calendar and Schedule of Due Dates

Dates when requests for Student Allocation Funding Forms are due to Student Activities Office.

1. By 5:00 pm Monday, September 30, 2013 for Friday, October 04, 2013 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
2. By 5:00 pm Monday, October 28, 2013 for Friday, November 01, 2013 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
3. By 5:00 pm Monday, January 06, 2014 for Friday, January 10, 2014, Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
4. By 5:00 pm Monday, February 03, 2014 for Friday, February 07, 2014 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
5. By 5:00 pm Monday, March 03, 2014 for Friday, March 07, 2014 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
6. By 5:00 pm Monday, March 31, 2014 for Friday, April 04, 2014 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
7. By 5:00 pm Tuesday, May 27, 2014 for Friday, May 30, 2014 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm



CHARTERED STUDENT ORGANIZATION APPLICATION for ADDITIONAL FUNDS

Chartered Student Organizations (CSOs) can only make one request for funds for the 2013/2014 Academic Year.

Please fill out completely. Round up or down to the nearest dollar. Request needed amount – DO NOT PAD REQUESTED AMOUNTS. **Incomplete or difficult to read forms will be returned and your organization's ability to receive funding will be delayed.** It is recommended that answers to all questions be typed and attached to this form to ensure legibility. The Student Allocation Board will request a balance amount on the 1010 and 8001 accounts to determine if funds in those accounts should be used in place of or addition to amount being requested. If funds in these accounts are not to be used for the purpose of this request then a reason should be included in this request for funds.

Today's Date: _____

Semester: FALL ☐ SPRING ☐ YEAR

Name of CSO: _____

CSO Advisor's Name: _____

CSO Advisor's Phone Number: (_____) _____

CSO Advisor's CNM E-mail: _____

Activity/Purchase for which Funds is being requested for:	Date of Activity

Note: Please refer to the back of this page for more information.



CHARTERED STUDENT ORGANIZATION APPLICATION for ADDITIONAL FUNDS

Please use additional paper if needed to answer the following details

Purpose of Scheduled Activity/Purchase – Please provide detailed information regarding what you plan to do with the funds, if approved:

Number of Students Influenced and/or Benefited by Purchase/Activity? How?

Please provide a Breakdown of Requested Expense(s): Be specific when providing details of itemized costs based on actual vendor price quote(s) and indicate source of information. If actual quotes are not available, please provide supporting document(s) as to how the figures were derived.

What fundraisers does your CSO have planned for the semester to support travel, events, or purchase(s)?

Total cost of Activity/Purchase(s)/Project: _____

Anticipated Amount Earned through Fundraising: _____

Total Amount Requested from Allocation Board: _____

CSO Student Representative:

Name: _____

Signature: _____

CSO Advisor:

Name: _____

Signature: _____

Allocation Board Use Only

Approved: YES ☐ NO ☐

Date Reviewed: _____

Amount Approved: _____

Comments: _____



CHARTERED STUDENT ORGANIZATION ACTIVITY PLANNING FORM

Today's Date: _____ Date of Activity: _____

INSTRUCTIONS: This form is to be completed and approved **at least four (4) weeks prior** to the event/activity. This form is to be used for activities sponsored by the organization. The estimated attendance is needed to ensure that sufficient resources are made available. The cost account provided is to cover any needed CNM overtime fees required.

SPECIAL NOTE TO ADVISORS: When Security Officers or custodial staff is paid overtime to cover an event, the CSO sponsoring the event is responsible for paying any overtime.

TYPE OF ACTIVITY _____

NAME of CSO _____

CSO ADVISOR/OFFICER _____ TELEPHONE _____

LOCATION _____ TIME OF ACTIVITY _____

DESCRIBE ACTIVITY (types of events, special equipment used, food, music, DJ, etc.)

Use additional paper if needed

PROJECTED COST _____ CSO ACCOUNT # _____

EST. ATTENDANCE _____ CHILDREN (Y/N)? _____ PUBLIC (Y/N)? _____

SIGNED _____ DATE _____

CSO Advisor

SIGNED _____ DATE _____

Student Activities Coordinator

ENDORSED _____ DATE _____

Dean of Students



CHARTERED STUDENT ORGANIZATION
CNM FACILITY USAGE AUTHORIZATION FORM (FUF)

INSTRUCTIONS: This form is to be completed, signed, and turned into Student Activities Office four (4) weeks prior to the planned event/activity. This form is to be used for all CSO event(s)/activities. This form is to be signed by CSO Advisor, the Student Activities Coordinator and the Dean of Students. A copy of the approved form may be request by the CSO Advisor. A copy will be sent to CNM Security for proper notification. **NOTE: All audio/visual equipment must be reserved by the CSO Advisor.**

Advisors are responsible for all audio/visual equipment during the CSO event.

TYPE OF ACTIVITY: _____

DATE OF THE ACTIVITY: _____ CSO ADVISOR: _____

DAY OF WEEK (circle applicable days): SAT SUN MON TUE WED THUR FRI

TIME OF ACTIVITY: FROM _____ AM/PM TO _____ AM/PM

ROOM(S) AND/OR OTHER FACILITIES TO BE USED: _____

SERVICES REQUESTED (Check each one that is required):

Door Opening _____	Alarm Turned Off _____
Heating/Air Conditioning _____	Clean Up after Activity _____
Lounge (note access time) _____	Audio - Visual (arrangements to be made separately) _____
Vending Machines (note access times) _____	Other (Specify) _____

DESCRIBE ACTIVITY AND ANY SPECIAL SERVICES WHICH ARE REQUIRED: Please attach any additional information/documentation.

SIGNATURE of CSO ADVISOR: _____

DATE: _____

SIGNATURE of DEAN OF STUDENTS: _____

DATE: _____

SECURITY USE ONLY

RECEIVED: TIME: _____ DATE: _____

APPROVED: _____ DATE: _____



CHARTERED STUDENT ORGANIZATION PRICE QUOTE FORM

Today's Date _____ Name of CSO _____ Date of event _____
 Vendor Name: _____ Vendor Contact Person: _____
 Vendor Address: _____ Vendor Phone Number: _____

ITEM DESCRIPTION	QUANTITY	COST PER ITEM	TOTAL AMOUNT	PURPOSE OR USE OF ITEM(S) TO BE PURCHASED
GRAND TOTAL FOR PURCHASE			\$	

☐ CSO will pick up item(s) from vendor and will show proof of receipt.

☐ CSO will be make arrangements to have item(s) delivered to CNM Main Campus.

Date: _____ Time: _____ Location: _____

Agency Account Number: **_8001_** - _____ 1010 Account Number: **_1010_** - _____

Printed Name of CSO *Officer* Obtaining Quote

Signature of CSO *Officer* Obtaining Quote

(_____) _____
Phone Number of CSO *Officer* Obtaining Quote

CNM E-mail of CSO *Officer* Obtaining Quote

Printed Name of CSO *Advisor* Approving Quote

Signature of CSO *Advisor* Approving Quote

Signature of the Student Activities Coordinator

Signature of the Dean of Students



**CHARTERED STUDENT ORGANIZATION
RECORD OF FUNDS RECEIVED
~AGENCY 8001 ACCOUNT ~**

DATE: _____

NAME of CSO: _____

CSO's Agency 8001 Account : 8001- _____

Amount received for deposit: \$ _____

PURPOSE OF DEPOSIT: _____

By signing below, both parties agree that the amount listed above is the true and accurate amount for this deposit into the CSOs' Agency 8001 Account .

CSO Representative: _____

Student Activities Representative: _____

*A copy of the Cashiers Office receipt verifying the deposit into your Agency 8001 Account will be inter-office mailed to the CSO Advisor upon completion of transaction.

Student Activities Receipt Number: _____

Cashiers Office Receipt Number: _____

Raffle or event tickets must be individually numbered and carefully accounted for.
Please note tickets used:

Starting Number: _____

Ending Number: _____