



ADVISOR'S GUIDE

Purpose of Chartered Student Organizations

- 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 Chartered Student Organization.
- Ensure that your Chartered Student Organization understands and follows all CNM policy and procedures.
- Meet with your Chartered Student Organization regularly.
- Familiarize yourself with the goals of your Chartered Student Organization.
- Learn the procedures and policies pertaining to Chartered Student Organizations.
- Ensure that your Chartered Student Organization members' contributions and accomplishments are acknowledged.

MOST IMPORTANTLY REMEMBER TO

- Advise and guide; do not dictate.
- Establish basic ground rules to help students lead themselves.
- Ensure that you are aware and approve of all Chartered Student Organization purchases, events, and activities.
- Hold meetings regularly and conduct those meetings in a business-like manner.
- Avoid turning individual and group student activities into advisor activities.



FUNDING PROCESS

General Information

The CNM Governing Board has established very general guidelines for funding of Chartered Student Organizations. These guidelines are found in the CNM Source. The Governing Board has approved \$2.00 from each registration fee to go towards Chartered Student Organizations; the budget office administers the funds. A Student Allocation Board has been selected to distribute funds to Chartered Student Organizations and they have established more specific rules and regulations for expenditures. The Dean of Students is the control agent for all funds.

General Notes

Chartered Student Organizations at CNM are funded in a variety of ways: fund-raising, student fees, and donations.

The Chartered Student Organizations generally work with two separate accounts. A 1010 Account and an Agency Account.

- All Chartered Student Organizations 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.
- Chartered Student Organizations that plan to do fundraising must request to open Agency Account. An Agency Account is only set up by written request (e-mail or memo) from the advisor to the Student Activities Coordinator.

Chartered Student Organizations 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 DPC services.

Money collected from student fees is 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 determine how much will be allotted to each organization for projects, activities, or training (see Allocation Section of Manual).

Chartered Student Organizations 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 224-3238.

Expenditures from either 1010 or Agency Accounts must be supported and approved by the advisor of the Chartered Student Organization. Any Chartered Student Organization 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 student fee accounts and agency accounts. 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 not meeting the above criteria may be delayed or rejected from consideration.

ACCOUNTS

Chartered Student Organization General Account (1010)

\$2 of each registration fee is earmarked for Chartered Student Organizations. Currently, once a Chartered Student Organization is fully chartered, it receives \$500.00 in the fall term and \$500.00 in the spring term. Fully Chartered Sports clubs automatically receive \$250.00 in both fall and spring terms. To obtain additional funds, each Chartered Student Organization must make a formal application to the Student Allocation Board. 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. All purchase requisitions must come through the Student Activities Office (see the purchasing procedures section of this manual) and the Dean of Students' Office for approval.

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 Accounts (8001)

These accounts are used for funds that are generated by each individual Chartered Student Organization through fundraisers. There is a variety of ways Chartered Student Organizations can raise funds (see fund raising section of this manual for more information and guidelines). Please be aware that private checking accounts must not be opened for your organization. Also, be aware that funds earned must be immediately deposited (within 1 business day) into this account through the Student Activities Office at Main Campus.

To open an agency account, the advisor must submit a written request by e-mail or memo to the Student Activities Coordinator so that office can proceed with setting up the account.

It is the responsibility of the advisors and the Chartered Student Organization officers 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 the organization.

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



Excerpted from the Student Allocation Board Guidelines

GUIDELINES FOR EXPENDITURES OF STUDENT FEE ALLOCATIONS FOR CHARTERED STUDENT ORGANIZATIONS

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

- A. Scholarships
- B. Items for individual personal use such as clothing, uniforms, prizes or gifts (non-monetary recognition items such as certificates or plaques are allowable)
- C. Electronic equipment (laptops, digital cameras, TV's, VCR's, computer's, etc)
- D. Furniture
- E. Partisan or political activities and/or materials (e.g. electioneering or lobbying)
- F. Religious or devotional articles or activities (shrines, tracts, etc.)
- G. Members of clubs/organizations that are not CNM students cannot have any expense (travel, registration fees, dues, association fees, dues, prizes or awards, etc.) paid for with allocation (1010) monies.
- H. Allocated (1010) monies shall not be used to purchase items for use in raising funds for the organizations.
- I. 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.
- J. 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 or used, and what will happen with the item/equipment if the club/organization dissolves.

For more information, forms and guidelines
please see the Student Allocation section of this Manual.



PURCHASING PROCEDURES

Overview of Purchasing Process

In order to make a purchase using Chartered Student Organization funds, there are several steps which must be followed. These steps are necessary for CNM to be in compliance with laws 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 a Chartered Student Organization utilizing money from both student fees and from individual fundraising, 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 speaking, 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; and (3) the follow-up which ensures that the vendor will be paid. The 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. The CNM Student Allocation Board is responsible for determining how Student Fee monies can be spent (this is your 1010 account). The Allocation Board has a set of guidelines which details what are acceptable/unacceptable expenditures. Prior to initiating a purchase request using your 1010 Account monies, you should review these guidelines to ensure the purchase is an allowable expense. A copy excerpt of the current Allocation Board guidelines is included in this training manual (see Allocation Section of Manual) and you can contact the Student Activities Office for guidance.
2. 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 officially approved and the appropriate paperwork is generated and approved by all approving offices.
3. 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.
4. There are separate instructions regarding travel-related purchases in this training manual. The guidelines/regulations for travel-related purchases are different than for other purchases. Please check these before initiating any travel activities and receive assistance from the Administrative Coordinator in the Office of the Dean of Students.



TERMS & DEFINITIONS

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

Agency Account (8001): Account which contains funds received through a fundraising project or donations.

No Purchase Order Statement: A statement submitted by a vendor at the request of the advisor or student coordinating the purchase which states that the vendor will not accept CNM Purchase Orders (POs) as a means of payment (must be on company letterhead).

Permanent Item Purchase Form: Internal Student Activities document used when equipment or permanent items are purchased to identify how the item will be stored and monitored.

Price Quote Forms: Internal Student Activities document which is used to obtain quotes for items or services to be purchased.

Purchase Order: 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.

Purchase Requisition: A CNM form used to identify the goods or services a department or Chartered Student Organization wishes to acquire and serves to initiate the purchase process.

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



Initiating a Purchase Request

There are several things that must be done by the Advisor or a Chartered Student Organization Officer of the organization before the purchasing process can be started. Please follow these steps carefully and completely to ensure the purchase can be made without unnecessary delays.

1. In order to initiate a purchase you will need (a) a price quote from the vendor, (b) advisor approval, and, if necessary, a No Purchase Order Statement and/or Permanent Item Purchase Request Form.

All items needed to initiate a purchase must be submitted to the Student Activities Office at least 14 working days prior to the purchase date/event. The purchasing process may take longer if there are problems with vendors, items ordered or if there are errors on the Price Quote Form. It is recommended that you order far in advance any items that you will be using for Chartered Student Organization sponsored events to ensure 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 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 aware that some of these items can only be purchased with "agency" monies (8001)(See Student Allocation Board Guidelines for acceptable purchases) A permanent Item Purchase Request Form must be completed and submitted with other purchase information.

2. Ask vendors if they will accept CNM purchase orders for that type of item.

NOTE: If the company does not accept purchase orders from CNM, you must get a statement, on company letterhead, which states the company does not accept purchase orders and will only accept a check. This must be turned in with your request.

3. You will need a price quote for the exact items that you would like to purchase, submitted in writing from the vendor. Once you obtain the price quote from the vendor, please use the Price Quote Form available from the Student Activities Office (sample included in packet) and attach the price quote from the vendor to the form.
4. In addition, you will need to make sure you have completely filled out the Price Quote form in order for the form to be processed by the Student Activities Office; such as vendor, contact name, when the items are needed, etc.
5. Once all the proper paper work is filled out, please bring the information needed to initiate a purchase (price quote, advisor approval, Purchase Order Statement and/or Permanent Item Purchase Request Form (including any relevant fees needed) to Student Activities Office.



Check List of Information needed to initiate a purchase:

- ✓ Price quote (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)
- ✓ Advisor Approval (by e-mail only)
- ✓ Additional information for Purchase Requisition:
 - Vendor name, address, phone number, and contact person.
 - Chartered Student Organization name and contact information for officer coordinating the purchase.
 - Event or activity for which the item/service is being purchased and date when the item/service is needed.
 - Whether you plan to pick up the item or plan to make arrangements to have it delivered to CNM (if delivery, you must notify the Student Activities Office so that they can notify CNM Shipping and Receiving that the order will be in transit)
- ✓ No Purchase Order Statement (Only if Needed)
- ✓ Permanent Item Purchase Request Form (Only if Needed)

Purchase Requisition/Purchase Order

This section is provided to help you understand the purchasing process that takes place after you submit all the information /forms initiating the request. Although the Chartered Student Organization is not directly involved with most of these steps, it is important for you to know these steps in order to understand the complexity of the process and the lead time needed for the purchase.

1. **Purchase Requisition Prepared:** After all purchase information is received (via CNM Price Quote Form), the Students Activities Office will type purchase requisition, verify balances, and confirm cost accounts.
2. **Approvals Obtained:** After the purchase requisition is prepared and finalized, Student Activities Offices staff will obtain the required approvals from the Dean of Students and the Business Office. If there are any questions about the purchase, the advisor will be contacted by Student Activities Office for clarification.
3. **Purchase Office Processing:** After approvals are obtained and signatures acquired, the Student Activities Office staff will deliver the purchase requisition to the Purchasing Office for processing. *The Purchasing Office will process the requisition and issue a Purchase Order (PO). This step may take 2-10 days.*



4. **Purchase Order sent to Student Activities:** After the purchase Order has been issued and prepared, the Student Activities Office will be notified. Student Activities Office staff will then pick up the Purchase Order and return it to the Student Activities Office.

NOTE: If a check is being issued, the Chartered Student Organization will be contacted to pick up the check directly from the Business Office. Also realize that if a check is needed, the *request must be submitted at least 4 weeks before the item or service is needed.*

5. **Purchase Order Ready for Pick-up/Use:** Once the Purchase Order is returned to the Student Activities Office, it is ready to be issued to the vendor for the authorized purchase. The indicated Chartered Student Organization contact person and the advisor will be notified by the Student Activities Office that the Purchase Order(s) is ready and available for pick-up.
It is the responsibility of the Chartered Student Organization officers and/or advisor to pick up the PO. Failure to do so may result in delay of goods being purchased.

COMPLETING THE PURCHASE

This section will help you understand what needs to be done after you pick up your purchase order and to ensure the purchase is completed and that the vendor will be paid accordingly.

1. Take the Purchase Order with you to obtain your items. You should give the PO to the vendor in exchange for your items. You may only obtain items as they are listed on the Purchase Order - no quantity or cost increases, item substitutions, or new items are allowed. Violation of purchasing policy and procedure may result in disciplinary action against the Chartered Student Organization, officer, and/or advisor.
2. The vendor will provide you with your cash register receipt or an invoice. These items will be returned immediately to the Student Activities Office no later than one working day after purchasing items. The receipt or invoice must be itemized and accurately reflect the total cost. 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 Purchase Order Number may result in immediate disciplinary action.

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 Chartered Student Organization's account balance.

Remember PO first. Do not order anything until a PO is issued.



Chartered Student Organization ACTIVITY SCHEDULING PROCEDURE

To ensure that your event runs smoothly and that you have all the necessary support to accomplish your Chartered Student Organization purposes, begin the planning and implementation process for all events at least **four weeks early**.

The following procedure applies to all Chartered Student Organizations.

1. Chartered Student Organization Advisors/Officers must complete required forms and other documentation (see Forms Section of Manual) briefly outlining the event, requested date and location to the Student Activities Coordinator (SAC).
2. The Student Activities Coordinator determines appropriateness of activity, assesses the type of event, and notifies organization advisor of approval and if any other forms will be required.
3. For Chartered Student Organization activities (meetings, small events, etc.) the appropriate forms must be completed (see Forms Section of Manual).
4. For all Chartered Student Organization meetings an Activity Planning form must be filled out along with an FUF form. These forms can be found in the “Form” section of your manual.
5. All media equipment must be reserved and checked out by the Chartered Student Organization Advisor. The Chartered Student Organization is responsible for all equipment. In the case of special needs, it is the responsibility of the Chartered Student Organization Advisor to contact appropriate personnel (for example, Instructional Media Resources for AV needs or custodial for special instructions) after the advisor receives notice that distribution has occurred.

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



BULLETIN BOARDS

The Student Activities Office is responsible for the two bulletin boards located in the Student Services Center at the Main Campus. They are located at:

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

The following are rules for using the bulletin boards:

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

In addition, the Student Activities Office maintains two glass cases primarily for the use of Chartered Student Organizations. Materials must be submitted to the Student Activities Office for approval. Student Activities Staff will distribute the items to the appropriate places.

- Items are not to be posted on windows, doors, or walls. Any Chartered Student Organization who violates this policy may subject their organization to potential disciplinary action.
- Please do not post duplicates on the same board. This will allow room for others to post their flyers.
- Chartered Student Organization requesting to post on Bulletin Boards not managed by Student Activities, must receive approval to do so by the office that manages the boards.

Thank you for your cooperation!



STUDENT TRAVEL

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 traveling must fill this form out
 - Collect this form from all students traveling
- Fill out the **Medical Information Form**
 - Each student 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 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 we will accept them.

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

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** timeframe 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 (SSC202) 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 SSC202 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 employee handbook 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/Advisors 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. **Reimbursement for mileage or vehicle rental may not be approved.**



**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



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 SS OR 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. _____



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 holds the room(s)? _____
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 _____
Room 5 _____ and _____
Room 6 _____ and _____

What account number should be used to pay for accommodations? 1010 Account Agency Account Other

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



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)

<u>Advisor Name</u>	<u>Advisor ID#</u>	<u>Advisor Telephone #</u>	<u>Advisor Email</u>
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?



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



Medical Information

Name: _____

Address _____ Telephone: _____

Medical Insurance Carrier: _____ Policy Number: _____

Address: _____ Telephone: _____

Are you traveling to a foreign country? Yes No

If traveling to a foreign country, are you covered by your Medical insurance for medical expenses incurred while traveling? If not, additional coverage should be purchased to provide protection. Such coverage can be purchased through CNM's insurance carrier Poms & Associates.

Yes No

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.



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:



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 that.



Excerpted from the Student Allocation Board Guidelines

Revised February 27, 2009

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

A. Automatic Allotment

- ◆ Each fiscal year every club/organization receiving their “chartered” status for the upcoming year will receive an automatic \$500.00 allotment per Fall and Spring semesters.
- ◆ Each fiscal year sports clubs who have been officially endorsed will receive an automatic \$250.00 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.
- ◆ Clubs/organizations may request an extension of time for using these funds by completing the Extension Request Form.
- ◆ 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 and CNM ECOS).

B. Supplemental Allotment

- ◆ Student organizations and clubs 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 and CNM ECOS).
- ◆ 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.



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

- 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.



Student Allocation Committee Schedule for Requests and Meetings

All Chartered Student Organizations requesting funding from the Student Allocation Committee must complete the following:

- A. Contact Student Activities Office for proper Student Allocation Request forms.
- B. Complete Student Allocation Request forms.
- C. Return Student Allocation forms to Student Activities Office for review and finalization.
- D. Allocation will then discuss and vote.
- E. Allocation will notify Student Activities with final decision, followed by notification from the Student Activities Office Coordinator on decision.

Student Allocation Committee Calendar and Schedule of Due Dates

Dates when requests for Student Allocation Funding Forms are due to the Student Activities Office at Main Campus (SSC109).

1. By 5:00 pm Monday, September 28, 2009 for Friday, October 2, 2009 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
2. By 5:00 pm Monday, October 26, 2009 for Friday, October 30, 2009 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
3. By 5:00 pm Monday, November 30, 2009 for Friday, December 4, 2009 Student Allocation Committee Meeting @ 1:00 pm- 3:00 pm
4. By 5:00 pm Monday, January 25, 2010 for Friday, January 29, 2010 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
5. By 5:00 pm Monday, February 22, 2010 for Friday, February 26, 2010 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
6. By 5:00 pm Monday, March 29, 2010 for Friday, April 2, 2010 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm
7. By 5:00 pm Tuesday, June 1, 2010 for Friday, June 4, 2010 Student Allocation Committee Meeting @ 3:00 pm- 5:00 pm



Chartered Student Organization
ACTIVITY PLANNING FORM

Today's Date: _____ Date of Activity: _____

INSTRUCTIONS:

This form is to be completed and approved at least 4 weeks prior to the event. 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 are paid overtime to cover an event, the Chartered Student Organization sponsoring the event is responsible for paying any overtime.

NAME OF ACTIVITY _____

CHARTERED STUDENT ORGANIZATION _____

CLUB ADVISOR/OFFICER _____ TELEPHONE _____

LOCATION _____ TIME OF ACTIVITY _____

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

Blank lines for describing the activity.

PROJECTED COST _____ COST ACCOUNT _____

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

SIGNED _____ DATE _____
Advisor

SIGNED _____ DATE _____
Student Activities Coordinator

ENDORSED _____ DATE _____
Dean of Students



CNM FACILITY USAGE AUTHORIZATION FORM (FUF)

INSTRUCTIONS: This form is to be completed, signed, and turned into Student Activities Office 2 weeks prior to the planned activity. The form is to be used for all Chartered Student Organization Events. The form should be signed by Advisor and the Dean of Students. A copy of the approved request will be returned to Advisor.

TYPE OF ACTIVITY: _____

DATE OF THE ACTIVITY: _____ ADVISOR: _____

DAY OF WEEK (circle applicable days):

SAT SUN MON TUE WED THUR FRI

TIME OF ACTIVITY: FROM _____ TO _____

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:
ATTACH ANY ADDITIONAL INFORMATION

ADVISOR: _____ DATE: _____

DEAN OF STUDENTS: _____ DATE: _____

SECURITY USE ONLY

RECEIVED: TIME: _____ DATE: _____

APPROVED: _____ DATE: _____

NOTE: All audio/visual equipment must be reserved by the Chartered Student Organization Advisor. Advisors are responsible for all audio/visual equipment during the CSO event.



RECORD OF FUNDS RECEIVED
~AGENCY ACCOUNT~

DATE: _____

Chartered Student Organization: _____

CSO's Agency Account: 8001- _____

Number: _____

Amount received for deposit: \$ _____

PURPOSE OF SALE: _____

The parties signing below agree that the amount listed above is the true and accurate amount for deposit into this agency's account.

Chartered Student Organization Representative

Student Activities Representative

*A copy of the Cashiers Office receipt verifying the deposit into your agency account will be inter-office mailed to your 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 _____