



HOW TO SUBMIT AN A.S. PROPOSAL & CHECK REQUEST

UPDATED JULY 2023

What is an A.S. Proposal?

A Proposal is used when you (A.S. Directors, clubs, campus departments) want to Suggest, Recommend, Offer, or Propose to:

- hold an event / activity / fieldtrip
- spend A.S. or ICC funds, which are public funds, and have guidelines that must be followed.

What is an A.S. Proposal?

- A Proposal is an agreement between A.S. and the club, dept., etc.
- Proposals must follow the A.S. Fiscal Policy guidelines, as well as, BOT / AR policies, State & Federal guidelines.
- Proposals for funds are NOT guaranteed; they can be approved, denied, or partially approved, etc.
- An approved proposal must be followed and adhered to, since it is an agreement.
- Proposals are considered a Public Document; therefore, they may be available during a public meeting for viewing by all

Why is Prior Approval Important?

Since the Office of Student Life (OSL) oversees clubs, OSL must approve all club activities and expenditures before they take place.

No activities or expenditures will be authorized or allowed until prior approval is obtained. This is to:

- Protect SMC from any liability: injuries at our events, field trips, contractor-services, etc.
- Protect A.S. Directors, ICC Clubs, & SMC employees from any liability: spending and documenting the use of Public Funds.

Step #1:

Review Proposal Criteria

- Proposals must follow the A.S. Fiscal Policy guidelines, as well as, BOT / AR policies, State & Federal guidelines.
 - Be sure to review both before submitting a proposal.
- Proposals should be clear and specific in stating activity or event details.
 - Every item that the club intends to purchase with the requested funds should also be clear and specific. This includes the name of the item, the quantity, the price per unit, and the total cost of the items.

Step #2:

Be Mindful of Deadlines and Timelines

- All proposals should be submitted on electronic form by 2pm the preceding Wednesday of the meeting the club wants to be considered on.
 - Proposals that do not meet the posted deadlines may not be considered and/or may be delayed.
- You can find the proposal dates and deadlines in 'Forms and Documents' webpage on the A.S. Website (www.smc.edu/as)
- No Retroactive Funding is allowed in the ICC Allotment Account. Please do NOT spend any money until your proposal has received FINAL APPROVAL at an A.S. Board Meeting. Otherwise, you will not be reimbursed or worse yet, your vendor will not be paid.

Step #2:

Be Mindful of Deadlines and Timelines

- Proposals for events and field trips that DO NOT require funding should be submitted 3 weeks before the event or field trip.
- Proposals for events and field trips that DO require funding should be submitted earlier, 4-7 weeks before the event or field trip.
 - If you are requesting funding and are planning to be reimbursed, plan on submitting a proposal 4 weeks before the event/activity date.
 - If requesting funding, and need the funds beforehand, plan on submitting the proposal at least 6-7 weeks before the date of the event/activity. This is because it can take 20 business days for the club to receive the granted funds after the proposal receives approval.

Step #3:

Submitting Your Proposal

- You must submit your proposal via the electronic online Proposal Form.
 - Read the directions on the form carefully!
- Necessary forms to fully complete the Proposal Form:
 - Proposal Signature Page: Must obtain Signatures for all proposals. You can upload this sheet to the online proposal form or email it to OSL@smc.edu after submitting the proposal.
 - Proposal Budget Breakdown: Only needed if your Proposal requires funding. You must include a budget breakdown within the Proposal Form, or you may attach a budget spreadsheet to the Proposal Form before submitting.

Step #3:

Submitting Your Proposal

Other Forms You May Need to Upload to the Proposal Form:

- A.S. Co-Sponsorship Form: Only needed if co-sponsoring with another club or dept. Complete this form, obtain Signatures, and upload to your proposal.
- A.S. Multi-Logistic Form: Only needed for events that are more than one day or more than one location. Complete this form, obtain Signatures, and upload to your proposal.
- A.S. Inventory Form: Only needed if purchasing equipment (not supplies). Complete this form, obtain Signatures, and upload to your proposal.

For all A.S. Forms (see <https://www.smc.edu/community/office-of-student-life/student-government/forms-documents.php>).

Step #3:

Submitting Your Proposal

Other Forms You May Need to Upload to the Proposal Form:

Field Trips & Forms

The following five (5) forms must accompany any trip proposal

- Individual Form or Day Trip Form
- Signature Sheet
- Advisor's Field Trip Responsibility Form
- Field Trip Club Roster
- Safety Plan

All field trip proposals must include a comprehensive budget that outlines all costs of the trip including but not limited to:

- transportation, per diem, registration/conference fees, and lodging for all participants including advisors

Step #3:

Submitting Your Proposal

Field Trips & Forms

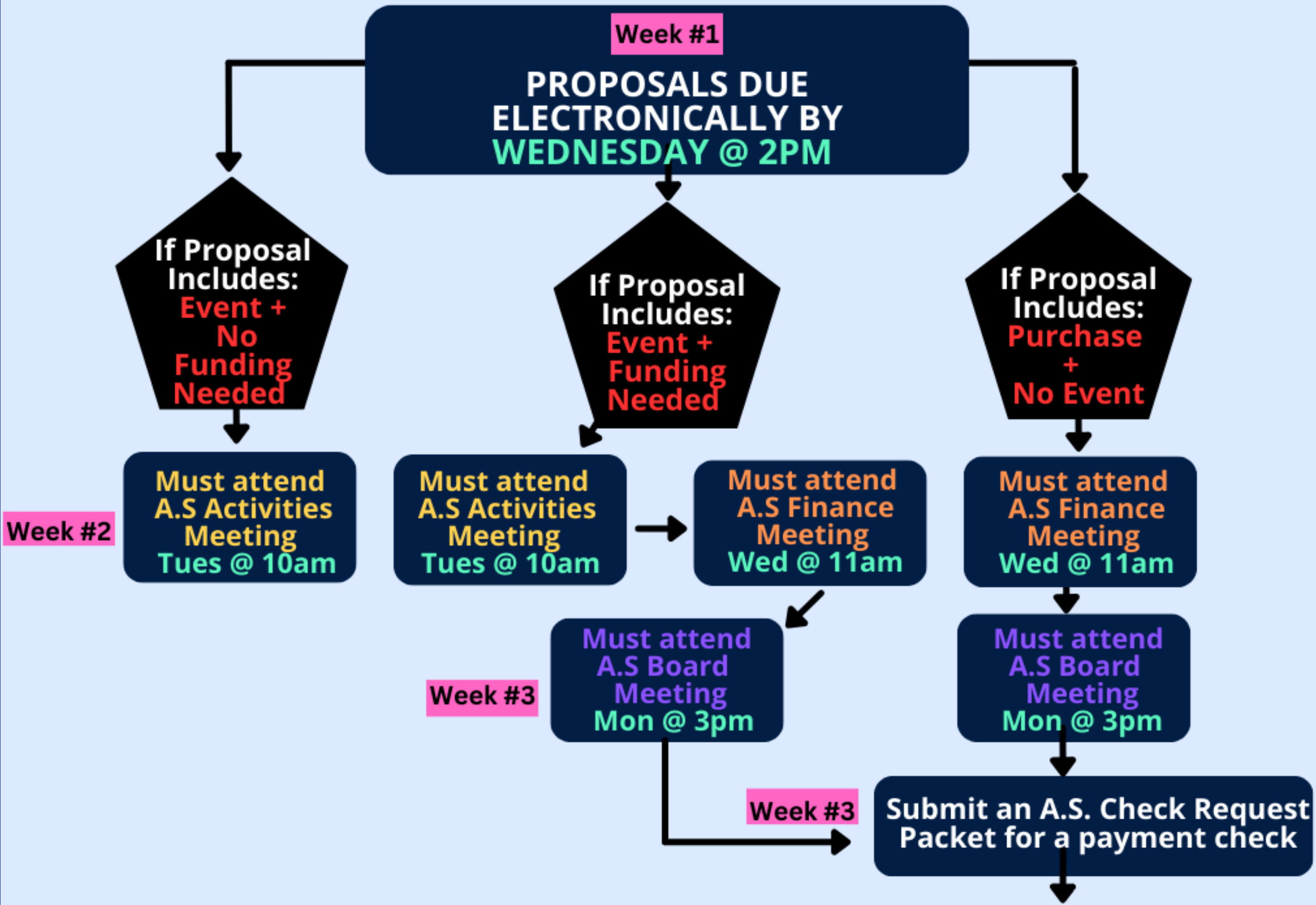
Form	Description
A.S. Field Trip Club Roster Form	Required For ALL Club Field Trips
A.S. Field Trip Day Trip Form	Required for Club / A.S. Director Day Trips ONLY
A.S. Field Trip Individual Form	Each Club Member or A.S. Director must complete this form for the following reasons: <ul style="list-style-type: none">• overnight trips (all students) or• students under 18 yrs. old, attending any day or night trip
A.S. Field Trip Early Departure Form	Each Club Member or A.S. Director must complete this form if they will be leaving before the field trip is over

PROPOSAL TIPS

- The Proposal Form is not savable – so you need to submit it right after working on it!
- For Proposals that need funding, you can include a budget breakdown in the Proposal Form, or you can attach the budget spreadsheet to the Proposal Form.
 - When looking at your proposal budget, think of including a 10-15% contingency for additional or unexpected costs.
- Once your proposal is presented at the A.S Finance meeting, the amount in your proposal can not be increased. Requested changes to the amount in a proposal **MUST** be emailed to the A.S Finance Committee ahead of time.
- A proposal to use funds from a club's allotment to purchase club-themed clothing or other items for promotional purposes should be submitted no later than the ninth (9) week of the fall and spring semesters and should adhere to the price limit guidelines established by the Finance Committee.

Step #4: OSL Reviews and Club Presents the Proposal

- Once a club has submitted a proposal, the proposal is reviewed by the Office of Student Life
- Once reviewed by OSL, the Club ICC delegate or President must be present at the required meetings to have their proposal voted on.
 - See Flow Chart to find which meeting(s) must be attended to obtain approval.
 - See Meeting Chart for Times and Dates
- The person presenting the proposal should be as familiar as possible with the details of the event, including the budget, agenda, advertising methods, and prior attendance of the event.
 - Make sure to check the meeting(s) agenda to confirm that your proposal item is present on the agenda beforehand.



Week #6 or 7

Note: Payment check takes up to 20 business days after submission of check request packet.

A.S. Meetings - Spring 2024

A.S. Activities

Committee Meetings

Please attend if you submitted an Event or Field Trip Proposal.

Tuesdays, 10 a.m. - 11 a.m.

Meeting Dates

- February 13, 20, & 27
- March 5, 19, & 26
- April 2, 16, 23, & 30
- May 7 & 14, 2024

A.S. Finance

Committee Meetings

Please attend if you submitted a Proposal requesting funds.

Wednesdays, 11:00am - 12:30pm

Meeting Dates

- February 14, 21, & 28
- March 6, 13, 20, & 27
- April 3, 27, & 24
- May 1, 8, & 15

A.S. Board of Directors Meetings

Please attend if you submitted a Proposal requesting funds or if you were asked to attend.

Mondays, 3pm - 5pm

Meeting Dates

- February 12, *21, & 26
 - March 4, 11, 18, & 25
 - April 1, 15, 22, & 29
 - May 6, 13, & 20
- * (meeting on a Wednesday, due to a Monday holiday)

PROPOSAL & CHECK REQUEST TRACKING CALENDAR

Week	Monday	Tuesday	Wednesday	Thursday	Friday
#1			Step #1 Proposals due by 2:00 p.m.		
#2		Step #2 If requesting an event / field trip, Attend an A.S. ACTIVITIES MEETING @ 10:00 a.m.	Step #3 If Requesting Funding, Attend an A.S. FINANCE MEETING @ 11:00 a.m.		
#3	Step #4 If Requesting Funding, Attend an A.S. BOARD MEETING @ 3:00 p.m., to receive FINAL APPROVAL, before spending any money.	Step #5 Submit an A.S. Check Request Packet for a payment check to OSL@SMC.EDU Payment check takes up to 20 business days after submission of check request packet.	Business Day #1 for A.S. CHECK REQUEST (A.S. Processing)	Business Day #2 for A.S. CHECK REQUEST (A.S. Processing)	Business Day #3 for A.S. CHECK REQUEST (A.S. Processing)
#4	Business Day #4 for A.S. CHECK REQUEST (A.S. Processing)	Business Day #5 for A.S. CHECK REQUEST (A.S. Processing)	Business Day #6 for A.S. CHECK REQUEST (A.S. Processing)	Business Day #7 for A.S. CHECK REQUEST (A.S. Processing)	Business Day #8 for A.S. CHECK REQUEST (Aux. Processing)
#5	Business Day #9 for A.S. CHECK REQUEST (Aux. Processing)	Business Day #10 for A.S. CHECK REQUEST (Aux. Processing)	Business Day #11 for A.S. CHECK REQUEST (Aux. Processing)	Business Day #12 for A.S. CHECK REQUEST (Aux. Processing)	Business Day #13 for A.S. CHECK REQUEST (Aux. Processing)
#6	Business Day #14 for A.S. CHECK REQUEST (Aux. Processing)	Business Day #15 for A.S. CHECK REQUEST (Aux. Processing)	Business Day #16 for A.S. CHECK REQUEST (Aux. Processing)	Business Day #17 for A.S. CHECK REQUEST (Aux. Processing)	Business Day #18 for A.S. CHECK REQUEST (Check in the Mail)
#7	Business Day #19 for A.S. CHECK REQUEST (Check in the Mail)	Business Day #20 for A.S. CHECK REQUEST (Check in the Mail)			

CHECK REQUESTS – TIMELINES (BUSINESS DAYS)

- Day #1 = Submit Check Request to OSL@SMC (Office Email checked by Michele, Amelia is backup)
- Day #2-3 = Reviewed for completeness and accuracy
 - Michele: Clubs
 - Amelia: A.S. Directors & Departments
- Day #4-6 = Once everything is complete and accurate
 - Amelia will obtain A.S. Signatures where applicable
 - A.S. Directors & Departments - A.S. Budget Management, and Associate Dean of Student Life
 - Clubs – A.S. Budget Management and Associate Dean of Student Life
- Day #7 = Amelia will send packet to Auxiliary Services
- Day #8-17 = Auxiliary Services processes form, issues check, and mails out the check.
- Day #18-20 = USPS Mail
- Note: this is an estimate, if there are errors, etc., then it will take longer.
 - If you do not receive your check within the 20 business days, please contact OSL@SMC.EDU
 - Please put in the subject line: Inquiring about a payment
 - In the body of the email: state the club name, the name on the check, proposal number, and the amount of the check

Step #5: Approved Proposals Have Deadlines

- For an Event / Field Trip: The deadline is the date on the proposal.
- Undated proposals expire by the deadline stated on the A.S. Website:
 - SPRING 2024 Proposal Deadline: Wednesday, 5/8/2024
 - SPRING 2024 last day for A.S./Club events: Tuesday, 5/28/2024
 - SPRING 2024 Check Request Deadline: Monday, 6/3/2024
 -

Step #6: Check Requests & Reimbursements

A.S. Check Requests

An A.S. Check Request is a document to request a check to be paid from A.S. or ICC monies. It is submitted electronically to the Office of Student Life.

- The amount of money and the purpose is stated on the approved proposal, which can be:
 - Vendor payment
 - Reimbursement
 - Budget Transfer (to SMC department only)

Step #6: Check Requests & Reimbursements

A.S. Check Requests

- No Unapproved Purchases: Only items or services stated on the approved proposal can be paid by A.S. or ICC funds
- Important Deadlines:
 - Last Date to submit Spring 2024 Check Requests is: 6/3/24 by 5pm.

Step #6: Check Requests & Reimbursements

Types of Check Requests

- There are 2 types of A.S. Check Request Forms:
 - A.S. Purchase Request Form: To make a Payment to a vendor, contractor, or an SMC department (do not use this form to pay an SMC student or staff).
 - A.S. Reimbursement for SMC Employees/Students Form: Includes student stipends. Do not use this form to pay vendors or contractors.

Step #6: Check Requests & Reimbursements

Purchase Request Form: Required Documents

Minutes

Invoice (Vendor Payments)

W9

Contract Packet

Signatures


Reimbursement: Required Documents

Minutes

Receipt(s)

Signatures

MINUTES

 Associated Students of Santa Monica College
A.S. Board of Directors Regular Meeting
September 26, 2022, 3:00 p.m. Zoom/Telephone
<https://zoom.us/j/98941154407>
Associated Students Office Phone Number: (310) 434-4250
MINUTES

I. Call to Order 3:00 p.m.

II. Roll Call

President, Kamiko Greenwood P	External Affairs, Tyrel Deverya P
Vice-President, Alyssa Arreola P	Activities, Francis Yang P
Secretary, Denise Lui P	Publicity, Chloe Heo P
Budget Management, Justin Liu P	Sustainability, Veronica Lin P
Basic Needs, Cecilia Jeong P	ICC Chair, Antoine Aoude P
Instructional Support, Anna Iyer P	ICC Vice-Chair, Katherine Nilesen P
Student Outreach, Evan Vasquez-Gomez P	ICC Communications Officer, Aika Taguchi P
Equity and Diversity, Emerald Hernandez P	
Student Trustee, Catalina Fuentes P	
Associate Dean, Thomas Bui P	Counselor/Adviser: Benny Blaydes P

III. Public Comments (2 Minutes Per Speaker)

- Tess Cavenah
- Miles Valdez
- Noomi Moya Vasquez
- Clinton

IV. Approval of Minutes — Sept 19, 2022

- Minutes of Sep 19, 2022, was approved without any objections.

V. Committee Reports & Informational Items

5.1 Finance Committee

- Finance Planning Spreadsheet
- Finance Flyer
- Training Videos (pending)

5.2 Ballot Bowl and Voter Registration

- Motioned by Student Trustee, Seconded by External Affairs.
- Without any objections, items 5.1 and 5.2 were tabled.

VI. Minor Action Items (Under \$1,000)- Consent Agenda

6.1 Approval for party rentals for ICC Club Awareness
(Antoine Aoude – Cost \$900.00, Requesting \$900.00, ICC) Proposal 007

- Motioned by Student Trustee, Seconded by Director of Basic Needs.
- Without any objections, item 6.1 was approved.

VII. Major Action Items (\$1,000 and over)

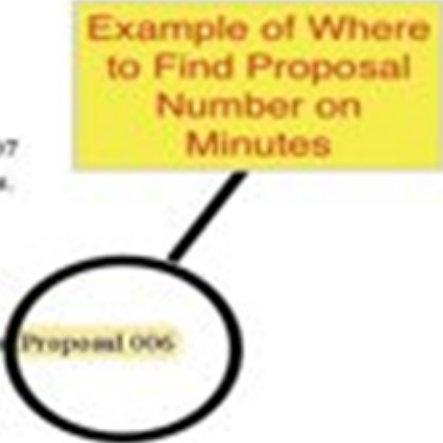
7.1 Approval for DJ and necessary purchases for Homecoming 2022
(Evan Vasquez-Gomez – Cost \$2400.00, Requesting \$2,400, Activities) Proposal 006

- Motioned by Basic Needs, Seconded by ICC Chair.
- Without any objection, item 7.1 was approved.

7.2 Approval for Speaker Fees for SMC Public Policy Institute Forum and Symposium
(Dr. Richard Takvildaran-Jeansein – Cost \$75,000, Requesting \$22,500.00, Activities) Proposal 008

- Motioned by Director of Basic Needs, Seconded by External Affairs.
- Without any objection, item 7.2 was approved.

Example of Where to Find Proposal Number on Minutes



• Make sure you include the correct Proposal number in the Check Request Form.

• You can locate the Proposal number in the A.S Board Meeting minutes.

• You must attach a copy of the meeting minutes with your proposal approval highlighted.

• Only attach 1 page of the meeting minutes – the page that shows your proposal.

INVOICE (VENDOR PAYMENTS)

- Required to pay a vendor for items /goods
- You will need to submit a Vendor Invoice & W9 Form into the Check Request Form
- The invoice must state that it is an 'Invoice' and contain the following information:
 - Invoice Number
 - Company Name & Contact Info
 - Sales Rep. Name
 - List of Items to be purchased (Price & Quantity per item)
 - Taxes, shipping & handling, & other fees
 - Total amount

W9 TAX FORM

- You will need to upload a W9 into the Check Request Form when paying a Vendor or Contractor
- The W9 tax form must have current year signature date



CONTRACT PACKET

- Needed when paying a Speaker, Performer, or a Vendor for contract services
- Will need to attach either the contractor / vendor's contract or a completed A.S Contract Packet into the Check Request Form
 - W9 Tax Form (blank copy included in Contract Packet)

SIGNATURES

- Signatures are important, please make sure that the signatures on the check request match the signatures OSL has on file
- The student payee and student officer cannot be the same person on the form
 - You will need another club officer that is on the original Club Signature Form to be listed as the Student Officer

RECEIPTS & REIMBURSEMENTS

- Try to pay with a credit card or debit card, to provide additional proof-of-purchase for vague receipts.
- There is a possibility of extreme Vague Receipts may not be reimbursed.
- **Receipts (in-person or electronic) must show the following:**
 - Vendor Name
 - Vendor Contact Info, at least one of the following:
 - Address, phone #, website, or email.
 - Date of Purchase
 - What was purchased - Itemized
 - Price of each item
 - Quantity of each item
 - Total amount Paid
 - Form of payment (credit card, cash, or bitcoin, etc.)

RECEIPTS

Correct Receipt

TRADE FAIR SUPERMARKETS

***** TRADE FAIR *****
23-55 BROADWAY, ASTORIA, NEW YORK

***** YOUR PURCHASES TODAY *****

CAMPBELL CHICK NDL	.99	F
ELMHST HALFBHALF	.89	F
JONES LIVERWURST C	1.50	F
PRODUCE	2.85	F
3 @ 5/1.00		
BAKERY	.60	F
**** TAX .00 BAL	6.83	
CASH	10.00	
CHANGE	3.17	

TOTAL NUMBER OF ITEMS SOLD = 7
1/28/04 3:50 PM 0007 05 0168 229

THANK YOU FOR CHOOSING TRADE FAIR
IF YOU HAVE ANY COMMENTS OR COMPLAINTS
SPEAK TO SAM OR ANGEL

***** PLEASE VISIT OUR WEBSITE AT *****
***** WWW.TRADEFAIRNY.COM *****

Vague Receipt

ll

TRUE FOOD KITCHEN
www.foxrc.com
451 Newport Center Drive
Newport Beach, CA 92660
949.644.2400

Server: Breanna DOB: 02/16/2012
02:28 PM 02/16/2012
222/1 8/80035

Visa 8388647
Card #XXXXXXXXXX [REDACTED]
Magnetic card present: [REDACTED]
Approval: 092817

Amount: \$ 33.54
+ Tip: 7-
= Total: 40.54

X [REDACTED]

Guest Copy

RECEIPTS

Example of Electronic receipt with all required information

amazon.com

Final Details for Order #114-8888888-7777777

Print this page for your records.

Order Placed: September 16, 2014

Amazon.com order number: 114-8888888-7777777

Order Total: \$89.99

Shipped on September 16, 2014

Items Ordered

Price

\$89.99

1 of: *Discovery V5+ 3.5 Inch Capacitive Screen
Waterproof Shockproof Android 4.2.2 3G Unlocked
Smartphone WiFi GPS (Green)*
Sold by: myshop10 (seller profile)

Condition: New

Shipping Address:

- Tren Nyna
- 777 Smith St.
- Wichita, Kansas
55555-9999
- United States

Item(s) Subtotal: \$89.99
Shipping & Handling: \$0.00

Total before tax: \$89.99
Sales Tax: \$0.00

Total for This Shipment: \$89.99

Shipping
Speed:
Standard

Payment information

Payment Method:

MasterCard | Last
digits: 0752

Item(s) Subtotal: \$89.99
Shipping & Handling: \$0.00

Billing address

- Mrs. Jane Doe

Total before tax: \$89.99
Estimated tax to be collected: \$0.00

Grand Total: \$89.99

VAGUE RECEIPTS

- Additional Proof-of-Purchase may be needed, if any of the required info is not on the receipt.
- May need to submit credit card statement showing the total amount paid in print.
 - Credit card statement must have the following items printed and not added:
 - Name of purchaser
 - Name of vendor
 - Amount charged
 - Last four-digits of the credit card:
 - Must match the four-digits on the receipt
 - If four-digits are not available on receipt, we can use the vendor name and date purchased on statement.

EXAMPLES OF VAGUE RECEIPTS



Example #1: Contact vendor for a detailed copy of receipt.



Example #2: Provide credit card statement for proof of purchase.

CHECK REQUEST TIPS

- All the instructions are on the form, start at the top and go through all the steps.
- Remember to upload the applicable forms where it is stated on the form:
 - Applicable forms: receipts, invoices, contracts, minutes page, etc.
- Reimbursement tip: Try to have one person pay for all of the items listed in the proposal, instead of multiple people purchasing items to make the Check Request process easier.

Step #7: Update Club Balance Sheet

- You will need to keep a balance sheet on your club ICC Allotment spending.
- Record the check request forms you have submitted and the total money spent.
- Take into consideration the proposals that are approved, but still need check requests to be submitted.
- Check out OSL/ICC webpage for links to budget sheet examples.

Step #7: Update Club Balance Sheet

CREATE YOUR CLUB'S BALANCE SHEET - EXAMPLE

Black Font = money in your account; Red Font = money spent and not in your account;

Blue Font = what you might be spending, but waiting on the exact amount (not to exceed).

Description	Amount
Fall 2020 <u>100% Installation</u> on 9/24/20 (contact ICC if you do not know the date or %)	\$600.00
Check Request – club president reimbursement for food	-\$50.00
Check Request – club advisor reimb. for online conference registrations	-\$200.00
Spring 2021 <u>66% Installation</u> on 3/25/21 (contact ICC if you do not know the date or %)	\$396.00
Balance	\$746.00
Proposal to be approved for club prizes during online karaoke night, not to exceed	-\$100.00
Proposal to be submitted for zoom workshop food reimbursements, not to exceed	-\$200.00
Balance	\$446.00

Have Questions? Contact Us!

Office of Student Life



310.434.4250



OSL@smc.edu



Smc.edu/as



Cayton Center, 2nd Floor,
Room #202

OSL Office Hours:

Fall & Spring:

M-F: 8 am – 5 pm

Summer & Winter:

M-Th: 8 am – 3 pm

Fri: 8 am – 12 pm

Have Questions? Contact Us!

ICC Officers

ICC Chair



310.434.4238



icc.chair@smc.edu

ICC Vice Chair



310.434.4968



icc.vice.chair@smc.edu

ICC Communications Officer



310.434.4270



icc.communication@smc.edu



smc.edu/icc