



# Club & Advisor Handbook

STUDENT LIFE & OUTREACH  
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## Welcome

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Clubs are a vital part of Student Life at Coastline College. The purpose of this handbook is to provide a comprehensive overview of the processes for creating, renewing, and maintaining a club at Coastline.

Student Clubs and Organizations are permitted in the Coast Community College District (CCCD) through Board Policy (BP) 5905 Student Clubs and Organizations. All club officers and members must adhere to Board Policies and Procedures, including: 3900 Speech: Time Place Manner; 5500 Student Code of Conduct; 5910 Sexual Misconduct; 6300 Fiscal Management; and 6902 Cash Receipt and Handling. All Board Policies and Administrative Procedures may be found on the District website at [www.cccd.edu](http://www.cccd.edu) under the Board of Trustees tab. This handbook is updated regularly to reflect changes made at the College and District levels.

## Clubs at Coastline

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Clubs may have an academic or social purpose. Clubs at Coastline are overseen by the Student Life & Outreach department with funding and final approvals provided by the Associated Student Government (ASG). Current forms and additional information may be found on the Club website [www.coastline.edu/clubs](http://www.coastline.edu/clubs). All paperwork submissions and questions should be directed to Kasie Hipp ([khipp@coastline.edu](mailto:khipp@coastline.edu)).

### CLUB ACTIVATION PROCESS

#### 1. Find Three (3) Student Members

Clubs must maintain a minimum of 3 student members to receive/maintain active status. Student members must meet the following requirements:

- Current student enrolled at Coastline in any credit/non-credit course
- Maintenance of a 2.0 GPA during period of membership

#### 2. Find an Advisor

Each club must have a minimum of one advisor. Advisors must be a currently employed Coastline faculty (full-time or part-time), classified professional, or administrator. Classified employees may refer to CFCE MOU #19-2. For more information about club advisors, please refer to the “Advisor” section of this handbook.

#### 3. Create Club Constitution

The club constitution explains how the club will operate and be structured. For more information, please refer to the “Constitution” section of this handbook.

#### 4. Submit Activation Paperwork

Each club must submit the **Club Activation and Renewal Form** and Club constitution to request activation.

### PERIOD OF ACTIVATION

Clubs are required to activate or renew every academic year. Clubs may only conduct meetings for official business during the fall and spring terms. Clubs will not be permitted to conduct any official business or hold events or other club-sponsored activities during the winter and summer sessions. For more information about club meetings and activities, please refer to the “Events & Activities” section of this handbook.

Expenses (including reimbursements for travel or food) will not be approved during the winter or summer sessions. For more information about reimbursements, please refer to the “Finances” section of this handbook.

### Advisor

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The advisor should support the objectives of the club, while advising on best practices for both student and club growth. It is recommended that the club advisor have an interest or specialization in the club objective. A club may have multiple Advisors so that the responsibility and oversight is shared.

Advisors must be a currently employed Coastline faculty (full-time or part-time), classified professional, or administrator. Classified employees may refer to CFCE MOU #19-2.

Club Advisors must be present at all club meetings and events. Club Advisors are responsible for overseeing club paperwork (including agendas and minutes), finances, requests to Student Life, and ensuring compliance with College, District, and State policy. The Club Advisor serves as the liaison between Student Life & Outreach and the club.

Club Advisors are expected to consider the following while advising clubs:

- Group effectiveness:
  - How well is the club working together to achieve its purpose and goals?
- Finances:
  - What fundraising opportunities is the club currently engaging in?
  - Is the money spent beneficial to the club and its promotion?
- Events:
  - What events are taking place?
  - What is the purpose of these events?
- Personal growth of the members:

- How are the members growing as a result of being involved in the club?
- Spend time with the members to learn their goals and what they are doing to achieve them.
- Adhering to the Club Constitution and mission statement:
  - Do you know what the club mission statement is?
  - Do the club members know what the club mission statement is?
  - Do students know how to adhere to the club mission statement?
  - Do students know why it is important to adhere to the mission statement?
- State laws and college policies:
  - When discussion is occurring, do you know the local/state laws and college policies that may be affected by this decision?
  - When events occur, does the club follow all policies and procedures of both Coastline College and the Student Life & Outreach Office?
- Advocacy for the club and its purpose:
  - What cause, project, or goal is the club aligned with?
  - How can you, as the advisor, help promote the club and encourage college-wide support?
  - How does the club benefit the College and students?

## Constitution

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All clubs must have a club constitution to be considered for activation.

### CONSTITUTION TEMPLATE

The following template may be used for the club constitution creation. Articles and sections should be stated in sentence form. The titles and content of articles and sections will vary, but the general format and content should be as outlined. For more information, please refer to the “Constitution Tips” section of this handbook.

#### *XYZ CLUB CONSTITUTION*

##### *ARTICLE I – Club Name*

##### *ARTICLE II – Purpose or Mission Statement*

##### *ARTICLE III – Membership & Eligibility*

*Section 1. Eligibility for membership (hint: they must be a Coastline student in good standing)*

*Section 2. Special requirements*

*ARTICLE IV – Organization: Officers and Duties*

*Section 1 Titles and duties of officers*

*Section 2. Term of office*

*Section 3. Eligibility for office*

*ARTICLE V – Elections*

*Section 1. Election process, timeline, member eligibility to vote, and voting methods*

*Section 2. Vacancies and special elections*

*ARTICLE VI – Meetings*

*Section 1. Frequency of regularly scheduled meetings*

*Section 2. Attendance requirements*

*Section 3. Quorum requirements*

*Section 4. Special meetings*

*ARTICLE VII – Amendments (Detailed process by which constitution may be amended)*

NOTE: Please email Kasie Hipp ([khipp@coastline.edu](mailto:khipp@coastline.edu)) if you would like to view a sample of an approved Club Constitution.

## CONSTITUTION TIPS

The following tips and questions may assist in the constitution creation process.

### Purpose or Mission Statement

- What is the purpose or mission of the club?
  - What do you want the Club to focus on?
  - What do you want to accomplish as a group?

### Membership & Eligibility

- What qualifications do you need to become an eligible member?
- Are there circumstances that would disqualify someone from being a member?
  - If so, who is responsible for completing membership checks?
  - If not, how do you handle members who are not a good fit for the club? (Note: Clubs should be open to all current Coastline students without discrimination on the basis of race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.)

### Organization: Officers and Duties

- Examples of officers and duties include:
  - President – Acts as executive leader of the club and is responsible for the day-to-day operations including, but not limited to, preparing agendas, supervising officers, and facilitating club meetings.
  - Vice President – Fulfills duties of the President any time the President may be absent and/or when the position becomes vacant. Assists President in carrying out their duties.
  - Treasurer – Reviews and makes recommendations to club on matters pertaining to income and expenditures of club funds. Works closely with the club advisor to manage funds. Submits financial reports to the club as requested. Meets with Coastline Business Office to understand the expectations and policies related to club finances (for more information, please refer to the “Finances” section of this handbook).
  - Secretary – Assists President in preparation of club meeting agendas. Shall take and transcribe minutes (official notes) at all official club meetings. Compiles and distributes handouts and publicity items. Writes and sends all correspondence for the club. Works with club advisor to ensure minutes detail necessary information for club reimbursements or event requests (for more information, please refer to the “Finances” and “Events & Activities” sections of this handbook).
  - Historian/Public Relations – Takes photos, collects memorabilia, and/or takes videos of all club activities for both fall and spring semesters. Assists in the promotion of the club to the campus community.
- What are the qualifications for being an officer?
- All club officers must be enrolled in at least 5 units in the Coast Community College District with most of the units at Coastline. How long can someone serve as a regular member or officer?
- Are there any scholastic requirements (GPA, unit count, etc.) to hold an officer position?

#### Elections

- How are officers nominated and elected to their positions?
- Who is eligible to vote in elections?
- When are elections held?
- How will vacancies be filled?

#### Meetings

- How often are meetings held?
- How many members are needed to be present in meetings for official decisions to be made (quorum)?



- Which members vote and how many members need to vote in favor of something for an official decision to be reached?
- What is the purpose of each meeting?
  - How do items get placed on an agenda?
  - Is there a time limit to discuss items?
- What is the protocol for members at club meetings?
- Who chairs/leads the meetings?

## CONSTITUTION CHANGES

All club constitution changes must be approved by Student Life. To request a constitution change, email Kasie Hipp ([khipp@coastline.edu](mailto:khipp@coastline.edu)) the following items:

1. Copy of old constitution,
2. Copy of new constitution,
3. Brief summary of intended changes and rationale, and
4. Meeting minutes indicating the club's vote to approve the recommended changes.

## Meetings

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Upon activation, clubs must meet at least once per month during Fall and Spring semesters to maintain active status. Meetings shall be held on-campus or online using an approved platform. Club advisors must be present for the entirety of each club meeting.

Each club is responsible for creating, taking, and maintaining club agendas, minutes, and records. Please refer to the "Minutes Template" included in the appendix.

Meeting minutes should include the following:

- Type of meeting (i.e. general, executive board, task force, work group, etc.)
- Date, time, and location
- List of members and guests present
- Time of call to order
- Approval and/or amendments to previous meeting minutes
- Summary of discussions, including: committee reports, officer reports, old and new business, advisor reports, member updates, and open forum
- Record of all voting results
- Time of adjournment
- Date, time, and location of next meeting

## Events & Activities

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All on-campus and off-campus events, fieldtrips, conferences, and fundraisers require Student Life approval.

Depending on the type of event or activity, President-level approval and possibly, District -level approval is needed. President level approval is completed with a Board Item when expenses are present and/or if the event/activity is outside of outside of a club's regular meeting/standards. If a contract/agreement is required for the event/activity, or the fiscal impact is \$95,200 or higher – District Level approval is needed. This includes, Risk Services review, General Counsel (Legal) review, and the Chancellor's approval. District approval may take 2-6 weeks. For more information, refer to the following sections in this handbook: "Off-Campus," "Fundraising," and "Non-Standard Agreement Procedures" in the Appendix.

Clubs are considered an entity of Coastline, as such, the College name and club name cannot be used prior to obtaining appropriate approvals. Moreover, ALL contracts must be approved by CCCD General Counsel and signed by the CCCD Chancellor (for more information, refer to the "Fundraising" section and "Non-Standard Agreement Procedures" outlined in the Appendix of this handbook).

The club advisor is responsible for preparing and submitting the appropriate Board Item(s) and appropriate liability releases and/or insurance coverage, in coordination with the Student Life & Outreach staff as needed. For more information or to discuss your specific event, please contact Kasie Hipp ([khipp@coastline.edu](mailto:khipp@coastline.edu)).

### ON-CAMPUS

On-campus events including, but not limited to, film showings and guests speakers, must be approved by Student Life through the **Club Event Notification Form** which may be found on the Clubs website ([www.coastline.edu/clubs](http://www.coastline.edu/clubs)). The Club Event Notification Form is not necessary when the club is participating in a pre-existing college event (example: Welcome Week or Join-a-Club).

### OFF-CAMPUS

#### Student Trips

Student Trips is an umbrella term used to describe a myriad of off-campus events and activities including, but not limited to, fieldtrips, community service, and conferences. A rule-of-thumb is to ask whether club or college funds will be used for students to attend an off-campus event or activity. If such expenditures are anticipated (even if only for mileage reimbursements, parking permits, or meals), then the proposed activity must follow the "Student Trip Approval Process" outlined in this handbook.

## Student Trip Approval Process

1. Club discusses potential trip in an official club meeting with advisor present. Club determines and records the following trip details in their meeting minutes: event date, budget, location, cost, transportation, attendees, and how the event is aligned with the club purpose. For more information about Club minutes, please refer to the “Minutes Template” provided in the Appendix.
2. Advisor (who is required to attend all student trips), must submit a **Conference Authorization Request “CAR” Form** (which can be picked up from the Business Services Office on the 2<sup>nd</sup> floor of Fountain Valley, Student Services Center) to their department chair and/or supervisor. CAR forms are not required for student attendees.
3. Club Advisor, in coordination with club leadership, completes, collects, and submits the following documents to Kasie Hipp ([khipp@coastline.edu](mailto:khipp@coastline.edu)):
  - a. Club minutes (see step 1)
  - b. Copy of Advisor’s CAR form (see step 2).
  - c. Board item (for more information, please see the “Board Item and Travel Presentation” information in the Appendix).
  - d. List of student attendees (include name, student ID, and email address)
  - e. **Standard VAP Form All Campuses** completed for each student attendee (Advisor may access the Voluntary Activities Participation (VAP) Waiver on the CCCD Navigator website).
  - f. Outline of all anticipated costs (transportation, food, mileage, parking, airfare, lodging, conference fees, etc.) and how the costs will be covered (i.e. club funds).
4. Kasie Hipp will review the submitted items and either route the items to the appropriate areas on campus for approval or request additional information from the club.

Trips must be fully approved before making any registration, flight, hotel, or other reservations. This means the College President must sign the Student Trip Board Item (see the “Board Item and Travel Presentation” information in the Appendix) and Conference Attendance Request “CAR” form (for advisor). Due to the number of steps required, it is recommended that all clubs plan a semester in advance for student trips.

## Expenses For Student Trips

While traveling, certain expenses are allowable. Event or conference registration fees, airfare, meals, hotel/lodging expenses, and transportation can all be covered by club funds or additional funds from ASG by request.

### *Meals*

Meal advances can be requested two weeks in advance through the Business Services Office (2<sup>nd</sup> floor of Fountain Valley, Student Services Center). Meal advances covering the cost of meals not provided by the conference or event registration for students cannot exceed \$35.00 per day (or \$9.00 for breakfasts, \$12.00 for lunches, and \$14.00 for dinners).

## FUNDRAISING

All Club fundraisers must be pre-approved by Student Life. All fundraising activities must be submitted at least three (3) weeks in advance of the date the activity is intended to begin. Fundraising activities may include the sale of pre-packaged foods and percentage fundraisers (example: Rubio's donating a percent of sales to the club). The Club Advisor is responsible for facilitating the planning, cash handling, and picking up/depositing of funds at the Business Services Office (2<sup>nd</sup> floor of Fountain Valley, Student Services Center).

Additional time may be necessary for fundraising requests requiring College or District-level approval (approximately 2-6 weeks). District-level approval will be necessary if the fundraiser involved a contract, upfront payment, or a signature. **ALL contracts must be reviewed by CCCD General Counsel (legal) and signed by the CCCD Chancellor.** For more information, please refer to the "Non-Standard Agreement Procedures" outlined in the Appendix of this handbook.

It is critical that the club advisor consult with the Student Life & Outreach Office prior to making arrangements with any outside organization, private donor, or business. In most cases, **donations of any kind must be processed through the Coastline Foundation** ([foundation@coastline.edu](mailto:foundation@coastline.edu) or 714-241-6154).

### Fundraising Procedure

1. Club discusses potential fundraiser in an official club meeting with advisor present. Club determines event details such as: date, time, location, budget, cost, if a cash box will be needed, and purpose of funds collected. These decisions must be reflected in the club minutes. For more information about club minutes, please refer to the "Meetings" section of this handbook.
2. Club completes and submits the **Club Fundraising Request Form**.
3. Within two business weeks of submission, Kasie Hipp will either: approve, deny, or request additional information from the club.
4. Once approved, Kasie Hipp will contact the Business Services Office to relay the approved fundraiser information and, if applicable, request the cashbox.
5. Before the event, the club advisor will pick up the cash box from the Business Services Office (2<sup>nd</sup> floor of Fountain Valley, Student Services Center).
6. After the event, all deposits must be accompanied by the **ASG Fundraising Reconciliation Form** or, if applicable, a letter from a donor as required by the Coastline Foundation ([foundation@coastline.edu](mailto:foundation@coastline.edu) or 714-241-6154).

## Finances

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Upon activation, each club will receive a one-time award of \$250 per academic year from the Associated Student Government (ASG). ASG will also match club fundraising efforts up to \$250

per academic year (for example, if a club fundraises \$300, ASG will match \$250, for a total of \$550). For more information, please refer to the “Fundraising” section of this handbook.

Additional funds may be requested by the club from the Associated Student Government (ASG); funding is awarded on a case-by-case basis (for more information, refer to the **Fund Request Form**). As much as possible, Clubs are encouraged to pursue allowable fundraising opportunities (please refer to the “Fundraising” section of this handbook).

The Club Advisor(s) and Club Treasurer should meet with the Coastline Business Services Office for cash handling training upon activation. The Business Services Office is located on the 2nd floor of Fountain Valley Campus, Student Services Center. Appointments can be made at 714-241-6151.

## FINANCE POLICY

- Clubs are not allowed to have off-campus accounts.
- All Club funds must be deposited in the Coastline Business Services Office (located on the 2nd floor of Fountain Valley Campus, Student Services Center).
- “Petty cash”—a fund that is collected and maintained apart from the Business Services Office—may not be kept for any reason.
- Advisors are responsible for supervising the handling of all student club finances. This includes, but is not limited to, the collection of funds at all events, setting up procedures for club fundraising, picking-up/dropping off the cash box, and overseeing expenditures of funds.
- No purchases, reimbursements, or bills may be processed during periods where the club is considered inactive (i.e. Winter and Summer Sessions).
- No purchases, orders of merchandise, or contracts will be processed without prior approval by the Club (with required votes recorded in minutes) and by Student Life.
- Clubs must be in active status and in good standing with the College and District to utilize their funds. For more information, please refer to the “Good Standing Requirements” section of this handbook.
- Funds shall be collected only by members and advisors associated with the club. Advisors are responsible for ensuring that funds are properly collected and deposited with the Coastline Business Services Office within **2 business days** following the event or activity.

## Good Standing Requirements

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To maintain “good standing” as an active Club, advisors and club leaders are expected to follow these guidelines:

- Club advisor must be present at all club-related events, meetings, or gatherings.
- Clubs must meet at least once a month on campus each semester and plan specific events/activities to give members a sense of purpose.
- Clubs must hold only approved events/activities.

- Club members must uphold the Student Code of Conduct and be good citizens who engage in responsible behavior.
- Clubs and club members must not destroy, deface, or tamper with college property.
- Clubs and club members must be civil to one another and to others in the campus community and contribute positively to student and college life.
- Clubs may not advertise events until the event has been approved by ASG.
- Clubs and club members must abide by College and District posting and marketing policies.

## Forms

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Current forms and additional information may be found on the Coastline clubs website [www.coastline.edu/clubs](http://www.coastline.edu/clubs). All questions should be directed to Kasie Hipp [khipp@coastline.edu](mailto:khipp@coastline.edu).

### Event Notification Form

All on-campus and off-campus events, fieldtrips, and activities outside of a club's regular meeting require approval. Some events may require District-level approval, including risk services review. Clubs may not advertise events until the event request has been approved. Document processing may take up to two business weeks. For more information about off-campus events and field trips, please review the "Events & Activities" section of this handbook.

### Fund Request Form

Additional funds may be requested by the club from ASG; funding will be awarded on a case-by-case basis. Clubs must be active and in good standing in order to receive funding. Document processing may take up to two business weeks.

Please note: upon activation, each club will receive a one-time award of \$250 per academic year from the Associated Student Government (ASG). ASG will also match club fundraising efforts up to \$250 per academic year (for example, if a club fundraises \$300, ASG will match \$250, for a total of \$550). For more information, please refer to the "Fundraising" section of this handbook.

### Reimbursement Request Form

The purpose of this form is to request an approved reimbursement from club funds and/or ASG. Document processing may take up to two business weeks after receiving a completed request packet. Additional time will be necessary for reimbursements issued through the Business Office. Please keep a copy of this form for your reference.

Required items for reimbursement request:

1. Club minutes (Highlight section with fund approval. Must include specific dollar amounts.)
2. Original receipt(s) (Tape receipts to a blank piece of white paper.)

## Additional Information

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### FACILITIES USE PROCESS

Coastline College uses the 25Live scheduling program for room reservations for the entire college (<https://25live.collegenet.com/coastline/>). Club Advisor(s) will need to make sure that they have access to this program and familiarize themselves with how to make requests. For more information about room availability and campus facilities, please check with the appropriate Area Facilitator at the campus you are desiring to request space at.

### PRINTING POLICY

Active clubs may request printed materials from the Coastline Print Services (<https://helpdesk.coastline.edu/marketingrequest/>). Clubs must approve funding for print jobs from their club funds during an official meeting. The Club must submit a **Reimbursement Request Form** to Student Life & Outreach, along with the receipt/invoice from Coastline Print Services to ensure payment.

### POSTING POLICY

College posting policies are detailed in AP 3900. Please check with the Area Facilitator at each location for questions regarding appropriate posting practices. All posted material must be removed within 24 hours following the club event.

### COLLEGE SERVICE CHARGE

Clubs are supported by the College Service Charge. All club members are expected to support college services through payment of the \$12 Fall/Spring fee.

## Frequently Asked Questions

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### Who can serve as a Club Advisor?

Advisors must be a currently employed Coastline faculty (full-time or part-time), classified professional, or administrator. Classified employees may refer to CFCE MOU #19-2. For more information about club advisors, please refer to the “Advisor” section of this handbook. If you are interested in serving as a Club Advisor, please contact Kasie Hipp at [khipp@coastline.edu](mailto:khipp@coastline.edu).

### What are the responsibilities of a Club Advisor?

Club Advisors oversee all club meetings, events, and procedures. Advisors are expected to be present for the entirety of all club activities and meetings, off-campus trips, or community service events. Advisor attendance at college events (such as Welcome Week or Join-a-Club) is optional. For more information about club advisors, please refer to the “Advisor” section of this handbook.

### Who do we go to for questions regarding Campus Clubs?

The Office of Student Life & Outreach supports Campus Clubs. Please direct club-related questions to Kasie Hipp at [khipp@coastline.edu](mailto:khipp@coastline.edu).

### Where can we find the list of clubs on the website?

A listing of Coastline's active clubs and advisor contact info is made available online at [www.coastline.edu/clubs](http://www.coastline.edu/clubs). For additional information or to update this information, please contact Kasie Hipp at [khipp@coastline.edu](mailto:khipp@coastline.edu).

### What is the process for activating a new club or renewing a club that was previously active?

All Clubs (new, continuing, and formerly active) must be activated once each academic year. To activate/renew a club, please refer to the "Club Activation Process" section in this handbook.

### What is the role of ASG with Clubs?

Clubs at Coastline are overseen by the Student Life & Outreach department with funding and final approvals provided by the Associated Student Government (ASG).

ASG hosts several events throughout the year where clubs are invited to attend, fundraise, and recruit members. Club officers are also highly encouraged to attend the ASG meetings, provide updates, and participate in discussions. Additional information about ASG may be found on the ASG website [www.coastline.edu/asg](http://www.coastline.edu/asg).



## Appendix

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### MINUTES TEMPLATE

*XYZ CLUB MEETING*

*MINUTES*

*Date*

*Location of Meeting*

*Call to Order:*

*President calls meeting to order. Secretary records the time the meeting begins.*

*Roll Call:*

*Secretary takes roll.*

*Minutes Additions/Corrections/Approval:*

*Approval of previous meeting minutes.*

*Committee Reports:*

*Updates on any special or standing committees (activities, publicity, etc.)*

*Officer Reports:*

*President, Vice President, Treasurer, Public Relations*

*Old Business:*

*Business handled or discussed at last meeting.*

*New Business:*

*Business that has never been officially discussed with the group before.*

*Advisor's Report:*

*A time for the advisor to speak.*

*Member Updates:*

*Announcements made by club members.*

*Open Forum:*

*A time for non-agenda items to be discussed (Items discussed during this part of the meeting are not considered official club action).*

*Adjournment:*

*President ends meeting. Secretary records the time.*

## EVENT PLANNING TIMELINE

Time Before Event	Tasks
6 weeks - 2 months prior	<ul style="list-style-type: none"> <li>• Submit Event Notification Form</li> <li>• Submit Board Item</li> <li>• Submit 25 Live Requests</li> <li>• Begin Marketing Requests (if design needed for swag items)</li> <li>• Place swag items order (e.g. Halo)</li> <li>• Begin Communications to VIPs</li> <li>• Submit Catering Orders</li> <li>• Begin contract processes, if applicable</li> </ul>
1 week - 1 Month Prior	<ul style="list-style-type: none"> <li>• Finalize Marketing Details</li> <li>• Finalize RSVPs</li> <li>• Confirm transportation, if applicable</li> </ul>
Week of	<ul style="list-style-type: none"> <li>• Send reminders to students or RSVPs</li> <li>• Verify contracts, vendors</li> <li>• Pick up Marketing materials from Print Shop</li> <li>• Prepare goodie bags/giveaways</li> <li>• Send speakers/presenter details</li> </ul>
Day Before	<ul style="list-style-type: none"> <li>• Pack items needed for event</li> <li>• Send final communication/reminders to staff and volunteers</li> <li>• Pick up checks for vendors</li> <li>• Print Check-in list/Sign-in Sheet</li> </ul>

## EVENT PLANNING CHECKLIST

### *Logistics*

- If Applicable, Submit Board Item. For more information, refer to the “Events & Activities,” “Non-Standard Agreement Procedures,” and “Board Item and Travel Presentation” sections in this handbook.
  - Board Approval Meeting Date:
- Contractors/Vendors Forms
  - New Vendors: W9, Quote, etc.
- Set up P.O./Direct Pay,
  - P.O. #
  - P.O. #
- Contractors/Vendors Forms, if applicable
- Finalize Event Agenda
- Additional Requests (not available on 25 Live):
  - M&O: Event materials transportation (to and from event)
  - AV/IT: Speakers, Extensions Cords

### *25 Live*

- M&O Requests
  - Tables & Chairs (round, rectangular, or cocktail)
  - Podium
  - Space Heaters
  - Additional Items: Coolers, Tents,
  - Extra trash bags and bins
- AV/IT Requests
  - Projector and Projector Screen
  - Extension Cords
  - Wireless Microphones
  - Speakers
  - DVD Player (additional Laptop or Computer if needed)
  - Classroom setup: Laptop, charger, projector, audio
- Security
  - Reserved Parking spaces (guest speakers, school buses, blood mobile, etc.)
  - Parking Permits
- People to Include
  - Supervisor
  - Area Facilitator
  - Security: Mike Colver
  - M&O: Kathy McKindley
  - Co-Sponsors, if applicable

*Marketing*

- Flyers
- Brochures
- Social Media (Instagram, Facebook, etc.)
- Student Newsletter and Blog Post
- Coastline App (QR code)
- Signage (Foam Core: Welcome, Agenda, Arrows, Rooms, Check-In, etc.)
- Backdrops
- Employee Newsletters, Student Newsletters

*Communications*

- VIPs: Board, Chancellor, & President (Laila Mertz)
- VPs, Deans, Directors
- Other Departments
- Classified Senate
- Academic Senate
- Canvas Announcement

*Packing List (Week of Event)*

- Luggage/crate
- Pens, Highlighter, Permanent Markers, Whiteboard Markers, etc.
- Tablecloth(s)
- Flyers/brochures/promo items
- Scissors, tape, masking tape, duct tape, blue tape
- Easels and/or sandwich board(s)
- Laptops and/or iPads
- Check-in lists/sign-in list
- Signage
- Agendas
- Plates, utensils, cups, napkins

*Shopping List (snacks, decorations, prizes, water, etc.)*

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## NON-STANDARD AGREEMENT PROCEDURES, AS OF JULY 2019

This process can take 2-6 weeks to get approval. Please work as far ahead in advance as possible.

All Agreements must be in the name of the District: **Coast Community College District (Coastline College)**

Signature Approval is the Chancellor or his Designee, if under the bid limit.

Start date of agreement is on (or near) the date of signature.

1. Department Manager/Dean reviews the agreement and approves moving forward to obtain VP level approval of the contract/agreement.
  - a. If software related, send agreement to Dave Thompson for IT review and approval.
2. Originator completes the Contract-Administrative Approval Request Form and sends it to their area VP for their approval along with 1 copy of the agreement.
3. Once the VP approves and signs the request form, the Assistant to the VP scans and emails the agreement to General Counsel requesting legal review. CC'ing contract originator, manager and VP.
  - a. General Counsel will provide legal review approval or feedback requesting legal changes.
  - b. If legal changes are requested, it is Originator's task to share with the contracting party. Please do not forward the email! Copy and paste his request of legal changes to the contracting party.
    - i. Send all revised agreements to your area VP Assistant and step 3 will repeat.
    - ii. If legal changes cannot be met and approved, your VP will follow up with your manager and President Adrian to request Chancellor approval to move forward.
4. When General Counsel has approved and/or legal concerns have been resolved, OR Chancellor has given approval to move forward notwithstanding General Counsel's recommendations -- obtain 2 copies of final agreement from contracting party with original/wet signature. They need to mail the 2 originals back to you. A scanned copy of the signed agreement can be used if time is an issue, but it is not the preference. (Original signature must still be mailed to you)
5. Prepare the appropriate Board Item, e-mail to Laila and route a hard copy for signatures.

6. When you receive the signed agreements from contracting party, send the 2 signed copies and printed General Counsel approval email to your Area VP Assistant. The Assistant will attach the original Contract Approval Sheet signed by your VP and send it to Risk Services.
7. Risk Services will review and move forward for the Chancellor's signature. Once signed by the Chancellor or designee, Risk Services will send the fully executed contracts (2 signatures) to the originator.
8. Work/Services in the agreement can begin when the Chancellor signs!
9. When you receive the executed copies of the agreement, mail one fully executed contract to the contracting party for their records and file the other in your records.

## BOARD ITEM AND TRAVEL PRESENTATION

The following are excerpts from the Board – Travel Presentation, Feb 2020 provided by the Coastline Office of the President. For more information, please contact please contact Kasie Hipp [khipp@coastline.edu](mailto:khipp@coastline.edu) or Yadira Lopez-Daly [ylopez2@coastline.edu](mailto:ylopez2@coastline.edu) in the President’s Office.



BOARD - TRAVEL  
PRESENTATION Feb ;

### What Requires a Board Item?

- Anything outside of normal, everyday business and/or if it requires a check or reimbursement.
  - ❖ Types of Items for Ratification (President Approval):
    - Student Trip
    - \*Special Events & Projects
    - Institutional Membership and Subscriptions
    - Off-Campus Assignments
    - Staff Development
    - General Items of Business
    - Disposal of Surplus
    - \* If your Special Events & Projects item requires a contract, you need to also submit a Non-Standard or Standard Agreement as well. **Two** Board Items are required.
  - ❖ Types of Items for Ratification (Chancellor Approval):
    - ❖ Under Dollar/Bid Limit of \$95,200 and requires a signature
    - ❖ Standard Agreements/Contracts (CCCD form of contract)
    - ❖ Non-Standard Agreements/Contracts (Outside party contract)
    - ❖ Revenue Generating Agreements/Contracts
  - ❖ Types of Items for Board Approval:
    - ❖ Standard and Non-Standard Agreements/Contracts OVER \$95,200 – work cannot begin until after Board Member signs (1 day after Board Meeting)
    - ❖ Resolutions

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## Delegation of Authority

- **Board Policy 2430**

The Chancellor has been delegated the authority to approve a variety of actions, items, contracts and agreements which previously required Board of Trustees approval.

Once the Chancellor has signed off on a contract, it has been approved. (Standard and Non-Standard Agreements)

Once the President has signed off on a Board Item, it has been approved. (Special Project, Student Trip, Membership, Off-Campus assignment, etc.)

Items under \$95,200 will be approved by the Chancellor and placed on the board agenda for Board Ratification.

Items over \$95,200 will be placed on the board agenda for Board Approval.

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## Formatting Board Items

- Arial
- 12 pt.
- **BOLD** the **Headings**
- Left Justification
- Remove underlines or special formatting
- Do Not Use Tab key
- Write out dates – March 13, 2019 – don't include days of the week, unless a weekend  
~~3/13/19~~ ~~March 13<sup>th</sup>, 2019~~
- **Make it Easy - Use templates provided!**

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## Submission of Board Items

- READ & PROOF BEFORE SENDING.
- Email Board Item to Laila. **VERY IMPORTANT!**
  - In email Subject line – indicate the following:
    - BI-[Type of Item]-[Board Date]
    - Example: BI-NS Agreement-4-3-19
    - BI-Special Project-5-1-19
- Send one **type** of Board Item per email. (One board item can have multiple student trips, multiple ICs, etc.)
- Circulate the signed hard copy approval sheet right away.

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## Board Item Revision

New BI is submitted with added text below.

### Revision to Prior Board Action:

**Name and Acronym: Western Academy Support and Training Center (WASTC)**

**Term of Membership: July 1, 2014 – June 30, 2015**

**Cost: \$300**

**Purpose: To maintain an affiliation between the Academy Support Center and Coastline Community College Cisco Academy to provide operational support and access for courses according to the Cisco Academy usage guidelines.**

**Source of Funding: Contract Education Funds**

**Revision: To increase the cost to \$300 from \$250. Previous Board ratification: March 19, 2015.**

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## Travel - Conference/Meeting Attendance

### Current Policy (subject to change)

No conference authorization request (CAR) is required :

- When no reimbursement is requested
- AND
- When the conference is local (within Orange County).
  - **Required:** Email authorization from supervisor. Retain for liability purposes.

CAR is required when traveling outside of Orange County area with or without reimbursement requests.

No rental cars without a detailed explanation.

Email Yadira and Laila with Travel Revision information – CAR # and information that needs to be revised (dates, NTE \$, etc.)

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## Invitations to Chancellor, Vice Chancellors and/or Board of Trustees

If you have a College event in which you'd like the Chancellor, Vice Chancellors and/or Board of Trustees to be invited, please send me the information electronically ASAP, so that I can get it on their very busy calendars. Please indicate to whom you'd like me to extend an invitation.

Include the following information:

- Event Name
- Date
- Time, Location, Address
- Specify if the invitation includes a guest
- Include a copy of the invitation, flyer or information sheet, if possible

**Please send these to me electronically ASAP, so that I have time to prepare an invitation on behalf of the President. Thank you!**

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## Contracts/Agreements

- ❖ District Standard Agreements
  - ❖ The District has a large library of standard agreements that have been approved by the Board of Trustees as templates for use by the colleges.
  - ❖ **Risk Services** website is located on the CCCD Navigator site
- ❖ Non-Standard Agreements
  - ❖ Agreement/Contract from an outside vendor/company.
  - ❖ Must be in the name of the District – **Coast Community College District (Coastline College)**
  - ❖ Requires a Signature
  - ❖ Terms and Conditions – Legal Terminology
    - ❖ Terms of Service, User Agreement, Acceptable Use Policy, etc.

\$0 - \$95,200 – Chancellor must sign/approve – goes to Board for Ratification

\$95,200.01 and above – Board of Trustees must sign – goes to Board for Approval

That dollar amount is called the bid limit and it can/does change.

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**Contract Terms should not begin before signature dates.**

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