

Advisor's Handbook



INTRODUCTION

Advising student organizations is a time-consuming, but rewarding, responsibility. The purpose of this handbook is to establish guidelines and assist staff/faculty advisors of the various classes, clubs and other student organizations in understanding their responsibilities.

The State of California and San Marcos Unified School District require advisors to comply with a number of policies. The guidelines in this handbook will aid in that compliance. Examples of required reports and forms are included in the appendix of this handbook. Should you have any questions regarding this handbook or your responsibilities, please feel free to contact Shez Sirimanne, Activities Director.

Welcome to the world of advisors! This task, traditionally, is one that allows students and staff members to communicate and work together in an area of mutual interest. With the advent of state legislation in 1984 the roles of club advisors have been in transition and have recently become definitive. Now, steps must be taken to be sure that we are in accordance with this legislation. This means that the school has school sponsored clubs, which are co-curricular, and it has clubs that are religious, political or philosophical in nature, which are not school sponsored, but are allowed club privileges and a custodial advisor.

SCHOOL SPONSORED CLUB ADVISOR

A co-curricular club is school sponsored. The same privileges and restrictions hold true for these clubs as they have in the past. Here are some guidelines:

- The advisor helps establish the framework, which reflects the goals and attitudes of the club and its members and aligns the club to enhance the curricular program.
- The advisor follows prescribed procedures for room usage, finances and activities.
- The advisor must fill out the appropriate paper work, permission slips, liability waivers, and assure the appropriate number of chaperones are present for any event even if it is an after school activity.
- The advisor and the student leaders work hand in hand to set goals and guide the club throughout the year.
- The advisor helps students prepare and submit a yearly budget.

LIMITED OPEN FORUM ADVISOR

Clubs that are of a political, philosophical, or of a religious nature are not school sponsored, but enjoy many of the same privileges of a co-curricular club. Here are some guidelines:

- The clubs are under the care of a custodial advisor.
- A custodial advisor is mandated by law not to set goals, dictate policy, run meetings. They are not to make their personal or ideological opinions the focus of the club.
- The advisors are there only to insure that the rules of the school are upheld with regard to safety, room use, and financial transactions.
- The club is run solely by the students.
- The club is allowed to have speakers from the community be presenters during their meetings, but they must be approved, as all speakers are, through the office. They may not meet with the students on a consistent basis.

High Risk Clubs

- Each member of the club must complete a SMUSD Release of Liability and Assumption of Risk Agreement
- The club advisor is responsible for making sure these forms are complete and on file for an entire school year
- All high-risk clubs must obtain approval from the SMUSD Risk Management office, the principal, and the ASB
- The following are example of high-risk clubs that may be approved: bike riding, roller hockey, ice hockey, lacrosse, skateboarding, and surfing

THESE EXAMPLES ARE NOT GUARANTEED APPROVAL

Creating a Constitution

All clubs and other student organizations are and must be authorized by the Associated Student Body as outlined as the ASB Constitution. They must have a yearly Club Charter on file in the file.

Organization of Clubs

To become a recognized part of the student body organization, a club must be composed entirely of students enrolled at Mission Hills High School. Any group of students may apply for permission to form a club by submitting a proposed constitution for their organization. The constitution must include (at minimum) the following information: 1) powers and duties of the manner of election; 2) the scope of proposed activities; and 3) the name of the organization. Upon approval of the application, an employee of Mission Hills High School must be appointed to act as supervisor of the activities of the club. A club may only be denied access to the school setting, in the San Marcos Unified School District, if it is seen as a threat to the safety and welfare of the student body, or is seen as disruptive to the educational process.

Finances

Clubs must follow the same regulations when it comes to finances. The records of each club must be accurate and ready for audit upon request. California State Law and SMUSD Board Policy require that students must have input in regard to the spending of student generated money. It is necessary that your club/organization maintain accurate records of all expenditures and should be included in the club/organization's minutes of meetings. The minutes should show:

- The motion to spend money, including the item to be purchased & the amount to be spent
- The name of the student who made the motion
- The name of the student who seconded the motion
- The number of votes FOR and AGAINST the motion
- A copy of all minutes should be on file with the club/organization advisor

Fundraisers

The most challenging part of being an advisor can be fundraising. However, if you stick to guidelines fundraising should be a bit easier. Each club should organize a plan for raising organizational funds and submit this plan for approval by the ASB. The plan must include the method of establishing financial accountability. **ALL FUNDRAISING ACTIVITIES SHOULD BE CLEARED BY THE STUDENT COUNCIL** and added to the Master Calendar. This will prevent the duplication of fundraising activities. A minimum of one weeks notice must be given to faculty for events that may potentially disrupt class. If an event requires the use of campus facilities, the club advisor must gain clearance from the Assistant Principal in charge of facilities prior to planning the activity

Cash boxes will be made available to assist you in selling your items. Please be sure to request a cash box and the change you require from the bookkeeper (at least a day in advance). Cash boxes must be turned in to the bookkeeper on a daily basis, immediately following your event.

When distributing any prepaid items for individual members to sell, make sure that the Advisor or Club Treasurer has kept an accurate record of how many items were distributed to each member and the date. Once the member has sold the items, they should **immediately turn monies in to the Finance Office**. They will provide them with a receipt of deposit. It is the member's responsibility to take the receipt to the Advisor or Treasurer to be recorded.

Club Officers

The club officers are critical to the success of a club. Their time and dedication can help ensure that a club will be fun and productive. Following is a description of essential club offices and should be included in the establishment of your club.

Club President

The president is the leader of the club. The club is usually only as effective as the president, who must be committed to the goals and purposes of the organization. The president presides over and conducts meetings according to parliamentary procedures. The president is also responsible for developing agendas, scheduling fundraisers, creating a budget, and working with the club's advisor. The club president must also attend or designate someone to attend the mandatory Club Congress Meetings and report back to club members.

Duties

1. Before the meetings:
 - Prepare an agenda with other club officers
 - Meet with club advisor to review agenda
 - Ensure all club members are notified about the time and location of the meeting
 - Ensure meeting location is reserved and all appropriate paperwork has been submitted
2. During the meetings:
 - Conduct the meeting
 - Follow the agenda
 - Encourage participation by all club members and visitors
 - Help clarify activities and recommend a plan of attack
 - Summarize action items and ask for volunteers to chair necessary sub-committees, as needed
 - Conclude the meeting and set next club meeting date
3. After the meetings:
 - Review the meeting with other club officers and advisors and address way of possible improvement
 - Plan next meeting's agenda

Club Vice President

The vice president assists the president in carrying out his/her duties. In the absence of the president, the vice-president presides at club meetings and carries out all additional responsibilities normally done by the president. The most important role of the vice president is the overseeing of all committee work.

Duties

1. Before the meetings:
 - Meet with any outstanding committees prior to the club meeting and reviews progress
 - Prepares a report on committee works and progress
 - Help prepare agenda with other club officers
2. During the meetings:
 - Assist committee chairperson in making committee reports
 - Collect and maintain all committee work assignments
3. After the meetings:
 - Carry out any tasks delegated by the president
 - Follow up on committee work or assignments
 - Help plan next meeting with other club officers

Club Secretary

The secretary must take accurate notes at all meetings and prepare minutes (See 'Meeting Minutes' section). In addition, the secretary prepares correspondence on behalf of the club. The secretary assists the president in keeping permanent records for the club and copies of all minutes and committees reports. The secretary maintains a copy of the club constitution and the club handbook for reference when needed.

Duties

1. Before the meetings:
 - Help prepare agenda forms
 - Ensure that the minutes from the previous meeting are done and copies are ready to be shared
 - Assist vice-president in having all necessary toll such as paper, pencils, and master calendar for meeting
2. During the meetings:
 - Take attendance
 - Read last meetings minutes
 - Record the actual working of any motion
 - Take careful notes to create minutes
3. After the meetings:
 - Prepare minutes in concise, clear language
 - File copies of minutes for future reference
 - Complete any required club correspondence

Club Treasurer

The club treasurer is responsible for maintaining accurate financial records for all expenditures. The treasurer reports all money spent and collected and of the account balance.

Duties

1. Before the meetings:
 - Prepare financial report
 - Help prepare agenda with other club officers
2. During the meetings:
 - Make a report of money spent, collected, and current balance
 - Issue receipts when required
 - Make a year-end report and maintain accurate accounting books at all times
3. After the meetings:
 - Maintain up to date budget log
 - Handle any club financial business and ensure all funds are turned over to the school financial clerk in a timely manner.

Checklist for Spending Money from your Account

IMPORTANT REMINDERS:

- ALL PURCHASES REQUIRE PRIOR APPROVAL
- PURCHASES MADE WITHOUT A PURCHASE REQUISITION WILL NOT BE REIMBURSED
- QUESTIONS: Contact Shez Sirimanne (x 2760) or Jolene Clark (x 2713).

Step One: Before you begin the requisition process:

- **Decide with your team/organization** how you would like to spend student funds. **You must have MEETING MINUTES showing that the club approved the expenditure(s).**
- Obtain a **quote/estimate** from your vendor.
- Obtain the **Purchase Order Requisition Form** from **Self-Help File, Jolene or ASB**

Step Two: Complete the Purchase Order Requisition Form

- Obtain club advisor's/coach's signature
- Obtain club/sport/organization student representative signature
- Attach quotes/estimates and any other important documentation.

Step Three: Submit the completed Purchase Order Requisition Form to Finance Office

- Turn in form directly to Jolene Clark in the Finance Office no later than **Wednesday at 2:45 PM** in order to be approved at the weekly ASB Business Meeting.
 - ✓ Jolene will confirm that funds are available and submit to ASB
 - Loans/Transfers are available under special circumstances, i.e. fundraising is being conducted, students will pay for items.
 - Your P.O. may still be approved, but money will not be dispersed until proper funds have been deposited.
 - **DO NOT PLACE AN ORDER IF YOUR P.O. IS "PENDING"**
 - ✓ ASB Council meets for weekly business meeting on Thursdays during 4th period

Step Four: Await approval & place your order

- If approved, you will receive an **Official Purchase Order** in your box
 - ✓ Proceed with order
 - ✓ Provide your vendor with the printed Purchase Order number and/or the hard copy of the P.O.
 - ✓ If your order is "pending," the P.O. will be placed in your box **once funds have been deposited.**
- Don't forget to keep a copy of all documentation for your records!

Step Five: Verify order & disburse payment

- **Receive/Verify order**
 - ✓ Check your order against the packing slip/invoice you received from the company
 - ✓ Sign the packing slip/invoice if everything is correct
 - ✓ If there are errors, contact the vendor
- See Jolene to file a **Disbursement Order**

Checklist for Conducting a Fundraiser

The reality of today is that school finances are under scrutiny more than any other times in the past. Though there may seem to be excessive procedures, they are in place not only to protect the school district, MHHS, but more importantly to protect YOU (the teacher, club advisor, or coach). If at any time you have questions, please call Jolene Clark (x2713) or Shez Sirimanne (x2760).

IMPORTANT REMINDERS:

- NO RAFFLES OR GAMES OF CHANCE
- NO SELLING OF FOOD ITEMS
- NO CO-MINGLING OF FUNDS (Mixing School District accounts with ASB accounts)
- **A PURCHASE ORDER (P.O.) IS REQUIRED ON EVERY ORDER OF GOODS AND/OR CONTRACT FOR SERVICES BEFORE ANY AGREEMENTS ARE FINALIZED.**

Once you have decided on a fundraiser...

Step 1: Fill out a Fundraiser Request Form and turn it into Finance Office

- Forms are available in the ASB Room, Finance Office, or Self-Help File
- Please submit forms for approval to the Finance Office **NO LATER THAN 2:45 PM EACH WEDNESDAY, before** the desired start date of the fundraiser.
- **DO NOT START** the Fundraiser, until it has been approved by the ASB Senate.
- You will be notified if your fundraiser has been approved or disapproved on the Friday following your submission.

Step 2: Document sales, turn money in directly to Finance

- For your protection, please use the Sales Revenue Analysis Form to document your daily totals for on-campus sales and turn in cash collected on a daily basis
- If students collect money individually, have them turn in money **DIRECTLY** to the Finance Office. **DO NOT COLLECT OR STORE ANY MONEY FOR STUDENTS.**
- See Jolene Clark in the Finance Office regarding the details of your fundraiser and/or to request a Purchase Order for fundraiser items

Step 3: Analyze Sales and Order Goods

- Turn in Sales Revenue Analysis Form to Jolene and check that all students have deposited their monies with Jolene
- Place order with the company using your Purchase Order number. Make sure to remind the company to place the P.O. on the delivery. If there is no P.O., then the goods will not be accepted by the Receiving Department