

MEMORANDUM

DATE: March 3, 2025

TO: President's Planning Policy Council (PPPC)

FROM: Bradley Olin, Ed.D., Vice President for Business & Financial Affairs/CFO

SUBJECT: BFA Policies Recommendations - March 2025

We recommend the removal of certain policies that either duplicate existing California State University (CSU) policies without adding campus-specific details or primarily document procedures and processes rather than actual policy. Eliminating these redundant or procedural documents will not only streamline the manual and align our policy framework with CSU standards but also increase operational efficiency by reducing the time and resources needed for policy review and maintenance. [CSU Policy Library](#)

Policy	Status	Lead
Recommend removing:		
Business Travel	Duplication of CSU Policy 15645082	Stephanie Bracamontes
Procurement	Procedural- Handbook is already posted to website	Stephanie Bracamontes
University & Auxiliary Operating Reserves	Duplication of CSU Policy 12793248 CSU Policy 15644789	Stephanie Bracamontes
Administration of Student Org Funds	Duplication of CSU Policy 15008510	Bradley Olin
Minor Capital Outlay	Process for review of minor capital projects. Should be documented with an Administrative Detail.	Jim August
Recommend keeping:		
Chargebacks	Requires updates in terminology	Bradley Olin
Strategic Risk Management	CSU Policy 16707369 Campus Risk Management Policy. Further investigation needed regarding. Is a policy or AD required?	Jeff Kim
Campus Violence	Further investigation needed.	MariaElena Plaza



CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS POLICY MANUAL

Business & Financial Affairs

Approved By: Erika D. Beck
President

Policy Number: FA.06.001

Effective Date: 3/27/17

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Policy on Administration of Student Organization Funds

PURPOSE:

To provide guidelines for the administration of student organization funds. Monies collected in the name of the student organization for its activities must be used exclusively for the purpose of furthering the student organization's goals and objectives. Funds collected by or for CSU Channel Islands' student organizations must be administered by the University in adherence to CSU Policy.

BACKGROUND:

This policy implements the Integrated California State University Policy Manual Number 3141.01 (<https://csyou.calstate.edu/Policies/icsuam/FinalPDF/Section%203000%20PDF/3141-01.pdf>), effective July 1, 2016 which requires that monies collected in the name of a campus student organization be maintained in a campus or auxiliary bank account. Per CSU Executive Order 731 – Designation of Chief Financial Officer, the campus CFO is responsible for the business and financial affairs of the institution; at CI this would be the Vice President for Business & Financial Affairs. Per Executive Order 1068, the Vice President for Student Affairs (VPSA) is responsible for overseeing the chartering and recognition of student organizations.

POLICY:

Accountability:

The Vice President for Business & Financial Affairs and the Vice President for Student Affairs will administer this policy at CSU Channel Islands. The AVPSA for Campus Life and the AVPSA for Housing & Residential Education and Associated Students, Inc. support the implementation and adherence to this policy by student organization members and officers. Questions, comments, concerns should be addressed to the appropriate Vice President as herein defined.

Applicability:

This policy applies to all recognized student organizations and any funds collected by or for student organizations.

Definition(s):

ASI: Associated Students, Incorporated of California State University Channel Islands

BFA: Division of Business & Financial Affairs

EIN: Employer Identification Number



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Funds: A sum of money collected, saved or made available for a particular purpose.

SBS: Student Business Services

DSA: Division of Student Affairs

SOI: Student Organizations & Involvement – a function of Campus Life (CL) within the Division of Student Affairs (DSA) which supports students in establishing, developing, and maintaining student organizations

Policy Text:

Monies collected in the name of a campus student organization must be maintained in a bank account of ASI using the EIN of ASI. CSU Channel Islands does not allow student organizations to maintain bank accounts outside the University.

All funds collected by and for a student organization must be used to support programs and services that are connected to the mission of the student organization, as well as the mission of CSU Channel Islands.

Collection of cash and cash equivalents by student organizations must be executed in compliance with procedures as outlined by SBS.

Student organizations may access funds they have collected for payment of goods and services by following financial, purchasing, and payment procedures established by BFA and ASI.

EXHIBIT(S):

[Student Organization Funds Agreement](#)

[Student Organization Handbook](#)