

The Office of Student Life

# Treasurer and Secretary Mandatory Workshop

PRESENTED BY SONIA JUAREZ

# Agenda

## KEY PRESENTATION POINTS

Introduction

General Club Officer Responsibilities

Treasurer's Responsibilities

Secretary's Responsibilities

How do these two positions work together?

Changes for 2026–2027

Forms

Copyright Compliance

More Forms

Questions?

# Introduction



## WHO ARE WE?

## Student Life Staff

Sadie Grantham,  
Director of Student Equity, Activities, and  
Engagement

Sonia Juarez,  
Student Life Coordinator

Kristen Girard,  
Administrative Assistant II

## GENERAL CLUB OFFICER RESPONSIBILITIES

The club belongs to its members and it is the Officers responsibility:

- To see that the business of the club is conducted in an orderly, efficient, and proper manner.
- To see that the club operates according to its constitution and bylaws with general reference to the Robert's Rules of Order.
- To see that the group works toward accomplishing its goals and objectives.
- To help keep the group friendly and collaborative in which each member is given an opportunity to express themselves and participate in the club's program. If an officer's conduct becomes unprofessional, they should be remove themselves from the meeting.
- To typify to others through attitude and actions, the organization itself. An officer is its representative as well as its leader.

## CONTINUED GENERAL CLUB OFFICER RESPONSIBILITIES

- Be enthusiastic, outline needed work, and follow through to see the work is being done by those who have accepted responsibility.
- To budget time well and to give proper balance to academic programs as well as co-curricular activities.
- Evaluate meetings in terms of what has been accomplished and what benefits members have received.
- Keep in close contact with the club advisor. Without their approval or presence at meetings, the club and its officers do not exist.
- Inform ICC and the Office of Student Life about all upcoming events.

The max officer positions one person can hold is two; not within the same club



## **Duties of the Treasurer & Secretary**

The duties, as listed here, are general duties of the Treasurer and Secretary of any club/organization. Each club/organization should have a supplemental list of specific duties that are designed to fit the special functions and interests of their group. Also, if additional officers or standing committee chairpersons are appointed, their duties should be outlined and given to them at the beginning of their term of office.

## DUTIES OF THE TREASURER

The treasurer is responsible for all funds of the club including:

- Keeping an accurate balanced budget for the club.
- Be familiar with and accurately follow all club financial procedures.
- Collect all moneys. A receipt should be given for all moneys collected.
- Deposit all funds at the Accounting Services (AD-102) in the club's account. (All clubs are required to keep all moneys in the account maintained by the Accounting Services Department).
- Sign all requisitions along with the advisor and one other officer for the withdrawal of funds.
- Make certain the club expends money in keeping with the approved budget and within college policy and regulations.
- Make a treasurer's report at monthly meetings of the organization listing receipts, expenditures, and balance on hand.
- See all bills are paid promptly and any remaining funds are re-deposited.
- May propose and vote upon all club matters.

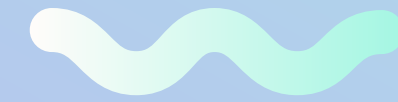
## DUTIES OF THE SECRETARY

Records and distributes minutes for all club meetings. Responsible for handling club correspondences and publicity, including providing up-to-date club files with Student Life and ICC.

- Record and keep accurate, permanent records of the club (minutes, documents, etc.)
- Maintain an accurate list of members, their Panther e-mail addresses and telephone numbers.
- Record all club meetings minutes using the online Club Minutes form.- the Club Minutes Form must be completed and submitted within 24-hours of the club's meeting.
- May propose and vote upon all club matter.

## HOW DO THESE POSITIONS WORK TOGETHER?

The Treasurer gives their report and the Secretary records it.



The two of them work together to help maintain an accurate account of the clubs moneys.

# IMPORTANT CHANGES FOR 2026-2027

- Club Advisor(s) must be present at all meetings.
- If the advisor is not present, students cannot meet in the reserved room unsupervised- as per district policy.
- No food is to be eaten in the classroom without prior clearance from the Dean's office.
- All officers can only be officers in no more than two clubs.
- There is an overall two-year term, position limit that an officer can hold an officer position in any club
- Event proposals must be submitted and approved, prior to submitting a funding request form.
- Funding requests are due by **12pm** and must be received **four weeks prior to the event.**
- Field Trip Requirements

## FORMS

All forms can be found at  
<https://www.chaffey.edu/studentlife/clubs-orgs.php>

## Forms we will be dicussing

- Event Proposal Form
- Club Minutes
- Funding Request
- Deposit Forms
- Club Balance- Email Sonia with your account number
- Short Form Service Agreement
- Waiver of Liability Form
- Transcript Inclusion Form
- Field Trip Requirements

# Forms that Go Hand in Hand



## EVENT PROPOSAL FORM

Submit at least four weeks prior to the event and you must receive approval before the event can take place.

Must submit prior to submitting a funding request.

## FUNDING REQUEST FORM

- Must be submitted four weeks in advance, NO EXCEPTIONS!
- Must be submitted online before 12pm on Tuesday, with check available on Thursday at 12pm at the campus store.
- There is NEVER ANY reimbursements
- Plan accordingly

## CLUB MINUTES FORM

- Any reports
- Discussion of event
- Motion & approval of any financial expenses.
- NO student ID numbers should be included

## DEPOSIT FORMS

Any unspent cash & receipts must be turned into AD-102 within three business days after the event.

# Copyright Compliance & Showing Movies on Campus

**Visit [Swank.com](https://www.swank.com) to obtain  
quote for license**

# SET-UP OF EVENT

## STEP 1

Submit Event Proposal- Students Submit

## STEP 2

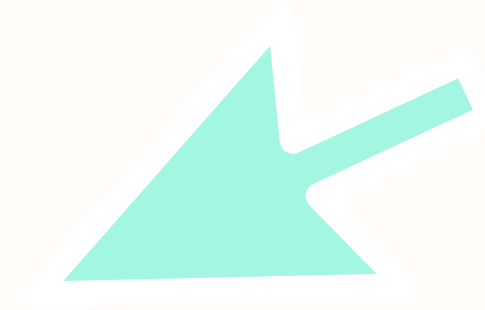
Enterprise- reservation of room or area where event will take place

## STEP 3

School Dude- reserve tables, chairs, etc.

## STEP 4

IT Request Form- reserve AV, such as podium, projector, speakers & microphone.



**ADVISOR HAS ACCESS ONLY**

# MARKETING THE EVENT

- Word of Mouth
- Flyers- must be approved & stamped prior to posting
- Online Presence
- Only club advisors can submit flyer requests thru Lithography

MAKE SURE THERE IS  
ROOM ON THE FLYER FOR  
THE STAMP: 2 X 2 WHITE  
AREA



## FACEBOOK

Get the word out about your event.



## INSTAGRAM

Get the word out about your event.



## TWITTER

Get the word out about your event.

# MORE FORMS

## **Short Form Services Agreement**

A short form services agreement is required for services that are supplied by an individual, a company, or an organization for an agreed upon fee. Chaffey College employees cannot be paid through these agreements. ***Sonia must complete these agreements.***

## **Waiver of Liability**

Students participating in a club activity are required to complete the applicable waiver of liability form. The signed form shall be retained in the office of student life for the entire academic year.

## **Transcript Inclusion Form**

When an officer is in good standing for six months or more, their position can be posted to their official transcript. This is for officer's only.

**Risk Management**



## Field Trip Requirements

\*Read Field Trip Handbook

\*Submit Adult Waiver Form

## Here are some bullet points:

- Club Advisor's must attend all club events, and any club- funded off-campus outings or events
- Club advisor's are responsible for room check-in and out on any overnight trips
- If a minor is attending a day trip, they must provide their own chaperone
- The waiver must be signed by all **ADULTS** who are attending any overnight trips and submit to [Nicole.Leonard@chaffey.edu](mailto:Nicole.Leonard@chaffey.edu)

SONIA JUAREZ

EMAIL ADDRESS:

[sonia.juarez@chaffey.edu](mailto:sonia.juarez@chaffey.edu)

PHONE:

909-652-6589

**Contact  
Information**



Q & A ? !