Advisor Manual

What's Inside:

ADVISOR: One who advises another, especially officially or professionally: consultant, counselor, mentor.

In the Spring of 2005, the Commission for Student Involvement determined the need for a "standardized" Advisor Manual that would be available online for advisors and practitioners to download and personalize. Over the course of a year, committee members consulted with Commission members; researched online manuals and other resources; and compiled and edited reams of information. The result of these efforts is this handbook. While written for student organizations, these resources may be adapted for Greek or residence hall populations as well.

Thanks to all of the commission members, advisors, and student affairs professionals who contributed feedback and resources. Every effort has been made to give credit where credit is due. If we mistakenly missed someone, please let us know and we will update our information. At this same time, if there is additional data that should be added to the volume, we would appreciate your feedback!

Special thanks to those who contributed, and to the committee members who spent countless hours pouring through volumes of information: Shana Warkentine Meyer, Kansas State University at Salina; Chris Gill, Fontbonne University; Michele Shelton, Emmanuel College; Amy Koeckes – University of Nevada – Reno.

There are many benefits associated with becoming an advisor to a student organization. Here are some:

* The satisfaction of seeing and helping students learn and develop new skills.
* Watching a disparate group come together to share common interests and work toward common goals and an understanding of differences.
* Developing a personal relationship with students.
* Furthering personal goals or interests by choosing to work with an organization that reflects one's interests.
* Sharing one's knowledge with others.

ADVISOR ROLES

Each advisor perceives his/her relation to a student organization differently. Some Advisors play very active roles, attending meetings, working with student officers, and assisting in program planning and development. Others maintain a more distant relationship to the organization. It is hoped that each Advisor will maintain some regular contact with his/her organization. An Advisor accepts responsibility for keeping informed about activities of the organization and for advising officers of the organization on the appropriateness and general merits of policies and activities. However, Advisors are not responsible for the actions or policies of student organizations; students are solely responsible. Advisors should be both accessible and interested and should provide whatever counsel a group or its members might seek.

Given the myriad of purposes, activities, and objectives of various student groups, the role of the Advisor will vary in some degree between groups. The purpose of this section is to outline basic roles of an Advisor. As groups vary in their expectations and needs, it is important that you, as an Advisor, develop an understanding with the organization you are to represent as to the nature of your involvement. The Advisor and group should agree on a set of expectations of one another from the onset and should write this list down as a contract between the group and the Advisor.

 Following are some of the roles you may assume as an advisor:
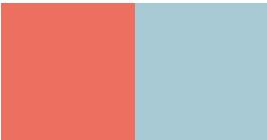
Mentor
Many students will come to see their advisor as a mentor and the success of these relationships can last many years and be rewarding for both the student and the advisor. If the student is seeking an education and a career in your field, you may be asked to assist in his/her professional development. To be effective in this capacity, you will need a knowledge of their academic program and profession, a genuine interest in the personal and professional development of new professionals, and a willingness to connect students to a network of professionals. You may be approached to review resumes, to connect students with community resources, or to be a sounding board for their ideas of what they want to accomplish in the field.

At times, students will seek out someone to assist with their personal development. In this capacity, a mentor will have a basic understanding of student needs and perspectives, a desire to challenge students intellectually and emotionally while providing support to meet the challenge, and the ability to listen to students' verbal and nonverbal communication. Students may want to talk to you about family or relationship issues, conflicts they are having with other students, or to have conversations about their ideas and thoughts on different subjects.

Team Builder
When new officers are elected or new members join the organization, you may need to take the initiative in turning the students from individuals with separate goals and expectations into a team. Team building is important because it enhances the relationships of the students between one another and the advisor. Positive relationships help the organization succeed and to work through conflicts and difficult times.

To accomplish the goal of creating an effective team, it is necessary to conduct a workshop (if you and the students have the time, a full-scale retreat encompassing team building and goal setting could be planned) to engage students in this process. As the advisor, you may consider working with the student officers to develop a plan and to have the students implement it. Training students in effective techniques for team building will keep students invested in the organization and give them the opportunity to learn what it takes to build a team.

Conflict Mediator

Inevitably, students are going to join the organization with different agendas, goals, and ideas about how things should function and the direction they should be taking. When working with students who have come in to conflict, it may be necessary to meet with them and have them discuss their issues with each other. In many cases, it may be necessary to remind them that they both want what is in the best interest of the organization. Ask them how they think they can work together, point out the organization's mission, and ask how their conduct is helping the group achieve its mission.

Sometimes, one student may be causing problems with other students. In many cases this student may not realize that his/her actions are causing a problem. In this case, speaking with the student individually could be helpful. Chances are that no one has met with the student previously and discussed how his/her attitudes are impacting other people and how those attitudes or actions can be changed to make everyone feel better. In many cases, the student will appreciate honest feedback.

Reflective Agent

One of the most essential components to learning in "out of classroom" activities is providing time for students to reflect on how and what they are doing. As an advisor, you will want your officers to talk to you about how they think they are performing, their strengths, and their weaknesses. Give them the opportunity to discuss their thoughts on their performance. Then be honest with them. Let them know when you agree with their self-perceptions and in a tactful manner let them know when you disagree. Remember, any criticism you provide students should be constructive and you will want to provide concrete examples of actions the student took that seem to contradict their self-perceptions. When students discuss their weaknesses, ask them how they can improve those areas and how you can help them. Students usually have the answer to what they need; they just don't like to ask for help. Remember to have students reflect on their successes and failures.

Educator

As an advisor, your role of educator will often come through the role modeling of behavior, guiding the student in reflection of their actions, and being there to answer questions. One of the most difficult actions to take as an advisor is to do nothing, but sometimes this can be the most important action of all. Allow the students to make their decisions even if they do not agree with your ideas. Sometimes, students will succeed; other times, they may fail. The key is to return to the role of the reflective agent and give the students a safe place to reflect on their experiences.
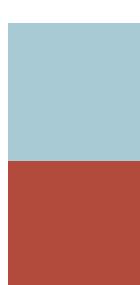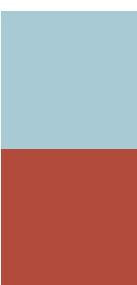
Motivator

As an advisor, you may have to motivate students to excel and to carry out their plans and achieve their goals. Some students are easily discouraged and at the first sign of difficulty they may want to quit. You will need to be their "cheerleader" to keep them excited about all of the potential successes they will experience. You can motivate students through the recognition of their efforts, appealing to their desire to create change, and to connecting their experiences here at the University to the experiences they will have in the community.

Policy Interpreter

Student organizations operate under policies, procedures, and rules. At times, students may not be aware of these policies and they will do things in an inappropriate manner. The more you know about these policies the better advising you can give to the students on their plans.

As an advisor you will assume numerous roles and all possible roles are not mentioned here. A key idea to remember is that you are an advisor not the leader. You provide guidance, insight, and perspective to students as they work on projects, but you should not be doing the work. Students will learn if they are engaged. Be careful of being challenged into doing the work for a student project. The students make the decisions, and they are accountable for those decisions, and for the successes and failures of their groups.

Sample Advisor Contract

A useful instrument for sharing expectations and clearly identifying an Advisor's role is the advisor's contract. Even if you don't choose to put your agreement into contract form, record your expectations for future leaders of the organization.

Sample Advisor Contract

The members of _____(organization)_____ request _____(name)_____ to serve as Advisor of the organization for a period not to exceed _____(how long)_____ beginning with ___(semester)_____.

Duties, responsibilities, and expectations of the position are as follows:
(List responsibilities and expectations of the Advisor and organization)

Duties and responsibilities may be reconsidered at the request of the Advisor, president, or majority vote of the membership in a regular meeting.

President's/Chairperson's:
Signature_____Date:_____

I have met with the president of the above-named organization and discussed the duties and responsibilities of Advisor as listed above. I agree to serve as Advisor and will fulfill these duties and responsibilities to the best of my abilities.

Advisor:
Signature_____Date:_____

This contract is effective for ___(period)___ and may be
renewed each year thereafter upon the agreement of both parties.

Information provided by Jim Mohr, Advisor for Student Organizations and Greek Life, Eastern Washington University

Advising Do's

Each advisor and organization leadership should openly discuss what kind of role the advisor should play with the organization. Some organizations have a pool of advisors to assist them with different aspects of the organization (financial, scholarship, programming, etc.) Some advisors have a high level of involvement with every aspect of the organization, others have a very limited role. It is up to the organization and the advisor to set the parameters of involvement.

With those thoughts in mind, the following list is a guideline to the "dos" of student organization advising:

- Assist officers with procedural matters. Be knowledgeable of the organization's purpose and constitution and help the general membership adhere to them.

- Be knowledgeable about, and comply with federal, state and local laws and ordinances, as well as campus policies. Inform the group of pertinent policies.

- Empower students to take action and to take satisfaction in seeing the student organization succeed.

- Allow the group to succeed, and allow the group to fail. Learn when to speak when not to speak. Remember to let the students make the decisions while you provide guidance and advice.

- Represent the group and its interests in staff and faculty meetings. Reach out to other advisors or departments (i.e. Student Organizations) for assistance.

- At the beginning, develop clear expectations about the role of the advisor and your relationship to the organization.

- Read the group's constitution.

- Get to know all of the members on an individual level. Learn what they want to get out of the organization. Maintain a complete officer and membership list with addresses and phone numbers (or know where to easily find one.

- Develop a strong working relationship with all the officers. Establish as needed meetings with individual members of the organization who need additional guidance in their officer or committee positions.

- Discuss concerns with officers in private and praise them in public.

- Meet with the officers and help them set goals. Encourage the Executive Board to disseminate reports (such as financial reports) to the general membership on a regular basis.

- Orient new officers and members to the history and purpose of the group and help them to build upon it. Help members look toward the future by developing long-term goals and communicating those plans to future members.

- Help to resolve intragroup conflict.

- Enjoy the impact you can have on the students' development. Help to develop the leadership potential within the group.

- Be visible and choose to attend group meetings and events. At the same time, know your limits. Establish an attendance schedule at organization meetings, which is mutually agreed upon by the advisor and the student organization.

- Know your group's limits. Help students find a balance between activities and their academic responsibilities.

- Keep your sense of humor and enthusiasm. Share creative suggestions and provide feedback for activities planned by students.

- Serve as a resource person. The advisor does not set the policy of the group, but should take an active part in its formulation through interaction with the members of the group. Since members and officers in any organization are ordinarily active only as long as they are students, the advisor can serve as a continuity factor for the group.

- Be consistent with your actions. Model good communication skills and listening skills. Develop good rapport.

- Be available in emergency situations.

- Head off situations that might give rise to poor public relations for the student group or University.

- Introduce new program ideas with educational flavor; point out new perspectives and directions to the group; and supply the knowledge and the insight of experience.

- Carefully review monthly financial reports from the organization treasurer or business manager. Familiarize yourself with the group's financial structure, from where the treasury is derived (dues, fundraising), for what the money is used, how money is allocated, and how the money is budgeted; assist in budget development and execution.

- Learn the strengths and weaknesses of the group. Offer support when necessary; but also allow people to make their own mistakes and learn from them.

- Encourage feedback and the evaluation process.

- Plan and encourage attendance at leadership training.

- Do things right and to do the right things. Guide and assist students in becoming responsible leaders.

- Provide support. Give the group autonomy but offer feedback, even when it is not solicited. Let the group work out its problems, but be prepared to step in when called upon to assist.

Once again, this list is not meant to be totally inclusive or applicable to every organization, but it may serve as a guideline when determining the role that you will play.

It is also important to bear in mind that the job of Advisor is not always an easy one. At times you may have to make a difficult decision or take an action which is not popular with the organization. It is important to realize that your first responsibility is to the health and well being of the students and to uphold campus and community policies and regulations. It may be necessary on occasion to use your authority to ensure that you meet these responsibilities.

Some information provided by Jim Mohr, Advisor for Student Organizations and Greek Life, Eastern Washington University; Office of Student Leadership Development Programs at East Carolina University; and Jon Kapell, Associate Director of Campus Activities, Drexell University; and adapted from the Wesley College Student Organizational Manual and Boland, Paul A., Student group advising in higher education, ACPA Student Personnel Series No. 8; Schreiber, V. and Pfleghaar, E. "Supervising vs. Advising", UMR-ACUHO, 1999; and Adapted from Leader Bits, University of Kansas.

Advising Don'ts

- Know it all.
- Be the leader or "run" the meeting.
- Say I told you so.
- Impose your own bias.
- Manipulate the group, impose, or force your opinions.
- Close communications.
- Tell the group what to do, or do the work of the president or other members of the executive board.
- Take everything so seriously.
- Take ownership for the group, be the "parent," or the smothering administrator.
- Miss group meetings or functions.
- Be afraid to let the group try new ideas.
- Become such an advocate that you lose an objective viewpoint.
- Allow the organization to become a one-person organization.
- Be laissez-faire or autocratic.
- Assume the group handles everything okay and doesn't need you.
- Assume the organization's attitudes, needs and personalities will remain the same year to year.

Some information adapted from Schreiber, V. and Pfleghaar, E. "Supervising vs. Advising", UMR-ACUHO, 1999

Responsibilities of the Student Organization to the Advisor

The responsibilities of Student Organizations to their advisor include, but are not limited to…

- Establishing and sharing a job description for the advisor that clearly defines his/her responsibilities and anticipated lines of communication anticipated.
- Notifying the advisor of all meetings, activities, and programs. Establishing an attendance schedule at organization meetings, which is mutually agreed upon by the advisor and the student organization.
- Providing copies of meeting minutes in a timely manner.
- Meeting regularly with your advisor to discuss organization matters.
- Consulting the advisor prior to making significant changes to the structure of the Organization.
- Consulting the advisor when any significant organization policy changes are made.
- Allowing the advisor to share their thoughts and ideas.
- Showing respect and value for the advisor whom the organization chosen to serve as guide and mentor.
- Considering all advice and guidance provided with an open mind and a sincere interest for improvement of daily operational and special event/activity needs.

Some information provided by Jon Kapell, Associate Director of Campus Activities, Drexell University

Questions You May Want to Ask the Organization

- How much involvement is expected or needed?
- How often does the group meet?
- How many major activities does the group plan per semester?
- How experienced are the student leaders?
- How do your skills match the needs of the organization?
- What are some of the problem areas that your organization specifically needs advisory assistance in dealing with? Ask for past examples.
- What are some of the ways the Advisor can be more helpful to the group?
- Will the Advisor be a silent observer at meetings or an active participant?
- Should you interrupt during meetings if you think the group is getting off track? How? When?
- If things get unruly, should you interrupt or remain silent?
- Is the Advisor expected to give feedback? How? When?
- Are there areas of the organization that are "hands off" to the advisor?

Office of Student Leadership Development Programs at East Carolina University

TROUBLESHOOTING

The following lists are provided so that an advisor may have a better idea of the types of problems he/she may face with their organization (Lorenz and Shipton, 1984). This list is not all inclusive, but may serve as a guide for the Advisor.

Leadership Problems
> The leader does not consult with the organization before making significant decisions.
> The leader appears to lack self-confidence, is non-assertive, and lacks interest in organization.
> A rivalry exists between leaders in the organization.
> The leader has work overload, and too many time-conflicts.

Membership Problems
> Low attendance at meetings.
> Members have low satisfaction and morale, are bored, do not communicate well, feel left out or are apathetic.
> Members compete for attention.
> An individual member's goals differ from those of the organization.
> There exists a lack of trust among members.
> Programs fail.
> There is a lack of ideas.

Organizational Problems
> Meetings are disorganized.
> Meetings are too long.
> The organization suffers from financial problems.
> There is no continuity from one year to the next.
> The organization has no "plan of action".

Inner-organization Problems
> Disagreement between an organization and other student organizations.
> Disagreement with institutional polices and procedures.

Advisor Problems
> Organization members avoid the advisor.
> Organization members do not pay attention to advisor's advice.
> The advisor is overwhelmed by their responsibility.
> The advisor assumes a leadership function.

Information provided by Jim Mohr, Advisor for Student Organizations and Greek Life, Eastern Washington University

Advising Styles and Skills

Situational advising allows you to change your advising style to match the development needs of the individual or organization you advise. Your advising style is the way you advise when you work with someone. It is how you conduct yourself, over time, when you are trying to influence the performance of others.

ADVISING STYLES
You will need to vary these based on your assessment of the students/groups readiness level. Many times, advisors may struggle with students because they believe that they need a higher level of interaction or direction when the student is actually able to accept more of a delegating style and vice versa.

Directing: The advisor provides specific instructions and closely supervises task accomplishments. Use this style with students/groups that are at a low level of readiness.

Coaching: The advisor continues to direct and closely supervise task accomplishment, but also explains decisions, solicits suggestions, and supports progress. Use this style with groups that have a few leaders that are at a higher readiness level who will need your support with the rest of the group to get things accomplished.

Supporting: The advisor facilitates and supports the efforts toward task accomplishments and shares responsibilities for decision making with the students. Use this style with students/groups that are just starting to understand the concepts that will lead to success - the group is just starting to "get it".

Delegating: The advisor empowers the students to conduct their own decision making, problem solving, and delegating. Use this style with students/groups that are at a high level of readiness.

ADVISING SKILLS
Flexibility: You must be able to move from one style to another in order to meet the needs of the different types of students and multiple circumstances you will encounter.

Diagnosis: You have to learn how to diagnose the needs of the students you advise. Determining what is needed as opposed to what is wanted is sometimes a difficult task. It is also important to note that what is needed is not always the thing that will get the most positive response - it is what will lead the student through a problem, set the standard for the future, or help to teach the student a valuable life lesson.

Contracting: You have to learn how to come to some agreements with students. It can be helpful to work together to reach an agreement as to which advising style they seek from you. This is a valuable lesson for assisting students with understanding the rules of engagement and interaction that will be carried forth as they mature.

Information provided by Jon Kapell, Associate Director of Campus Activities, Drexell University

LIABILITY AND RISK REDUCTION

As an advisor of a student organization, you are the university's representative regarding the organization's activities. As such, you are expected to give reasonable and sound advice to your organization about such things as programs, use of facilities and operational procedures. If you have reason to question an action taken by the organization, express your concern directly to the organization in writing, including the date, a suggested alternative to the questionable action, a warning, etc.

It is important to remember that, in general, while we need to be concerned about liability, we can seriously damage the educational process by being paranoid about it. Just as there is no specific statement that explains faculty liability for every possible classroom incident, there is none that covers all the possible situations student organizations might encounter. If you have concerns about a situation unique to your organization or to a specific event sponsored by the organization you advise, please contact someone from the university staff who is knowledgeable about liability and risk management.

Although there is no way to completely eliminate risk and legal liability associated with a program or event, there are ways to reduce risk and provide a safer environment for program participants. Here are a few things that your organization can do to identify and reduce risk:

♦ Complete a Pre-Event Planning Form to clarify the needs and expectations of participants.

♦ Identify specific risks involved in the event. These could include physical risks (such as an event with physical activity) and liability risks (such as events involving alcohol, minors, or travel).

♦ Identify options for reducing risks by including, but not limited to:

⇒ Hiring a third party vendor or contractor

⇒ Purchasing additional liability insurance

⇒ Preparing liability waivers, if necessary.

⇒ Providing advanced training

⇒ Assuming a 'worst-case scenario' and preparing for it in order to reduce likelihood of it occurring

⇒ Utilizing waivers that outline the specific nature and risk associated with the event.

⇒ Canceling the event if the conditions are dangerous or the group is not prepared to assume full responsibility for the risk involved

♦ Assess the capability of the group to manage risk.

♦ Identify the challenges in managing risk, as well as resources to assist in your planning.

♦ Develop a plan of action in reducing risk.

♦ Communicate with everyone involved (officers, members, advisors, participants, facilities staff,

Information taken from Ball State University Downloads for Student Organizations and Advisors and Adapted from University of Wisconsin-Stevens Point Student Organization Advisor Manual

Budgeting

One task groups face is the development of a plan to be fiscally responsible with funds. A budget can be a helpful method for keeping track of group funds.

A Budget is:
-A tool for planning and controlling organizational funds.
-A formal written guideline describing your organization's future goals expressed in financial terms within a set period of time.
-A detailed statement of estimated income and expenses.
-A historical record of the organization's activities during a given periods.

A Budget can:
-Help refine goals that reflect the realistic resource environment.
-Compel organization members to use funds efficiently and appropriately.
-Provide accurate information to adjust, analyze, and evaluate programs and activities.
-Aid in decision making.
-Provide a historical reference to be used for future planning.

Adapted from Leader Bits, The University of Kansas

Developing a Budget

- Begin preparations a month or more before the close of the current year.
- Prepare an outline of the organization's planned activities for the coming year
- Do careful studies, investigations and research of funding, cost and resources.
- Determine the available funds (carry over balance from previous year, cash on hand, funds in bank, interest, etc.)
- Estimate expected income and when it is expected to be available (dues, sales, etc.)
- Get price quotations on big expenditures, delegate responsibilities to members.
- Rank order by their relative importance, which activities/programs are the widest expenditures of funds.
- Choose programs to initiate; ask how much is available to allocate.
- Negotiate as necessary: eliminate or limit less essential expenditures.
- Revise, review, coordinate, cross-reference, and then assemble into a final budget; the budget must be flexible to anticipate conditions which might have been overlooked during planning.
- Vote to approve budget.

Managing the Budget

- Once approved, adapted and prepared, it should be monitored closely.
- Set and maintain a minimum cash balance.
- Formulate procedures and policies needed to achieve objectives.
- Keep an accurate log of financial transactions (income/expenses); maintain in a record book (check and balance records regularly.)
- Set up internal controls designed for safeguards and accurate accounting data.
- Control cost-allow only approved expenditures
- Assess budget regularly
- After the budget period has elapsed, determine the outcome of each expense and revenue. Make sug-

Planning Your Fund Raiser

- Set a goal.

- Ask for suggestions from your members. What do the members want to do? Brainstorm for ideas.

- Find out what has been done before. What worked? What didn't? Why? How can you improve?

- Check into local and state regulations. Check University policy.

- Involve all segments of your group, not just the officers. People contribute to what they create. Get as many volunteers for your project as possible. Make sure they understand the cause and are willing to contribute their time and effort.

- Determine your market: college students, community, parents, etc.

- Know your overhead.

- Advertise wisely.

- Let everyone know your expectations in advance and update on progress. Using a goal poster is a great idea; make sure that poster is displayed prominently.

- Recognize everyone involved in the planning and implementation of the fund raising project. Reward those who achieve. Make certificates, ribbons, or other type of small rewards for everyone who volunteered for the project.

- Thank supporters. Give your big donors some kind of tangible reminder of how they contributed to a good cause. Create and maintain good will with these contributors, because they will tend to help in the future.

- Complete a written evaluation or report. Make sure you include:
  · Contact names, addresses, and phone numbers
  · Time lines and important dates
  · Suggestions of things to do differently

FUNDRAISING

Many student organizations have big plans and excellent ideas for programs or services. However, few organizations have the finances to make these plans real. It is important for student organizations to have some kind of fund raising plans and to execute those fundraisers with the utmost professionalism, accountability, and legitimacy.

Fund raising events can be a lot of fun for all involved. It is important to make the fund raising project a group effort and to get as many people involved as possible. Not only will you have more help to accomplish your goals, but you will also get more people interested in giving money. The key to being successful in fund raising is to be creative and to keep your goal in mind.

Members of your organization will not get excited or interested in your fund raising efforts if they do not know where the money will go. In addition, members of the community will not give unless there is a good cause. Make sure that the reason you are raising money is a legitimate cause, and let everyone know why you are raising funds.

Corporate Sponsorship

One of the best ways to increase fund raising efforts is to obtain corporate sponsorship for an event, either through underwriting or direct contributions from companies. Corporations will help to fund an event if it is in their marketing plan. Are their customers likely to come to this event? Will sponsorship in an event help them attract new customers and get their name seen?

How to Ask for Corporate Funding

Plan far in advance. Most corporations plan their donation budgets six to twelve months in advance. Talk to a company as early as possible. Do not expect to get donations in a month.

Try to target a specific company who could definitely benefit from your cause rather than sending out blanket letters to everyone. By matching your cause and the company, there are better chances for a positive answer.

Learn as much about the organization you are soliciting before you actually ask for a dime. Knowledge of the company, their products and services, and their past charitable events will help see if they are the right match for you.

Address your pitch letter to the person in charge. Do NOT just write "To Whom It May Concern" or "Dear Sir/Madam." Call and obtain the person's appropriate name and title.

Put your proposal in writing. Enlist the help of your marketing and business majors to write the proposal in marketing terms.

State your cause in terms of benefits to the company. For example, a $25 ad in an ad book or a $25 poster that is going to be seen by 1,000 students at an event is inexpensive advertising for even small businesses.

Who to Ask

Since so many organizations are in need of the same kinds of donations and will be asking the same companies, it is a good idea to think of all the different possibilities. Your best efforts will be made with those firms and companies that primarily market their products or services to college-age students. Some examples are:

♦ Businesses located around campus are good, but sometimes they are overused and get approached a great deal. Be creative.

♦ Fast food companies (ice cream, frozen yogurt, hamburgers, etc.). You may need to ask the local manager or may need to write their district office. Many local fast food chains will provide free punch and drink cups if you are having a sporting event or project to benefit a local charity.

♦ Real estate companies that specialize in rentals to college students.

♦ Beauty supply distributors. Beauty shops may get ten requests for free gift certificates, but the distributors that sell them their products may not get any requests. As for the distributor's name and address, contact them directly.

♦ Soft drink companies. Look for the local distributor.

♦ Sportswear and clothing manufacturers.

♦ Health clubs.

♦ Cosmetic companies.

A Few Fundraising Ideas

The following are ideas for creative fund raising projects. This list just touches the surface of all the many projects available to raise money. Just be creative and do some great brainstorming for other ideas.

· Bake sale
· Recycling drive
· Rummage sale
· Marathons
· Pig Roast
· Road rally
· Talent show
· Handmade boat contest
· Paper airplane contest
· Spaghetti dinner
· Candy sale
· Drive-in movie
· Decathlons
· Best beard contest
· Car washes
· Invitational turtle races
· Kite flying contest

Here are more ideas

· Sell candy canes at holiday time
· Sell stadium seat cushions
· Sell buttons with school spirit slogans
· Pool/board game/bowling tournaments
· Sell flowers for special occasions
· Hand out advertising flyers for companies

And even more ideas

· Cartoon, horror movie, special films festival
· Product testing for local or national companies
· Pancake breakfast before hunting or fishing season
· Get on lists to act as group test subjects for surveys
· Euchre (or other card games) tournaments or marathons
· Carnival booth at Homecoming, Greek Week, or Family Weekend
· Pie auction. Bid for privilege of throwing a pie into another person's face
· Sell small throw pillows with the name of your organization glued on in felt
· Sell miniature paddles with the Greek letters or your organization's name painted on it
· Check with local trucking or car rental companies to wash their vehicles on a regular basis
· Watermelon contests (i.e. seed spitting, eating the fastest, the most (timed), throwing, stack-relay)

What to Ask For

Product: Straight-product contributions for samples to give to participants or for door prizes. Most companies have their products in trial sizes just for this purpose.

Printing: Underwriting the cost of printing posters, flyers, or t-shirts. In return, you will put their name and logo on all printer material.

Ads for Ad Books, Calendar or Program: Sell ad space in a campus calendar or program that is given out at the event you are sponsoring. You may want to give companies who donate products or supplies and materials free ads.

At an Event: Hang ads with logos on banners or posters for a fee. This is an excellent source of income at sporting events or anywhere there is a place to hang a poster during an event.

Program Planning Checklist

Over the course of time, your student organization will most likely plan a program of some kind. Programs can range from social to educational, for a cause or simply for fun. When planning a program, there are many factors to consider:

The who, what, when, where, why, and how factors:

Who is involved with the Program
Who will be involved with planning and implementing the program (hall council members, RAs, students, etc.)? Are committees appropriate and who will be on them? Who needs to approve the program?

What--Description of the Program
What will the program accomplish? Is it necessary? What is your target population (immediate community, local community, city, etc.)? How many people do you estimate attending?

What are the costs involved with the Program
Consider food, supplies, advertising, tickets, prizes, transportation off campus, etc. Should the program be co-sponsored with another group – Hall government, RHA, RA staff, other halls, Women's Center, MSA, Health and Wellness, etc.?

When will the Program happen
Does the date conflict with major exams, holidays, or other important events around campus?

Where will the Program be held
Locations include spaces in and around our building, our quad area and campus, off-campus sites.

How will people know about the Program
What needs to be done to advertise the program—posters, e-mail, personal contact? When does the advertising need to go out? Who will be in charge of coordinating ads?

Why?
What is the purpose of our program? What are our goals? Why are we doing this? How does this program support the vision and scope of our group?

Have you considered the following?
Gender bias and gender-neutral language; religious backgrounds, rituals and traditions; diverse racial and/or ethnic populations; needs of students with disabilities; economic limitations faced by some residents; heterosexual bias and diverse sexual orientations.

Inclusive Programming
When programming, it is important to be mindful of the differences of the people in the community. Individuals striving to create, and maintain, inclusive communities must ask the following question: "Whose perspectives, experiences, viewpoints, and voices are included?" Below, you will find general questions to assist your community building efforts:

Have you considered gender bias and gender-neutral language in your programming?
Did you assume that only men in your community will be interested in participating in intramural football?
Did you assume that only women will be interested in doing a crafts project?
Western society assumes that boys are supposed to act one way and girls another. Do not do the same.

Have you considered religious backgrounds, rituals and traditions in your programming?
If you have food at your event, will students of diverse religious traditions be restricted from eating it (some Jewish or Islamic traditions, and non-eating of pork)?
Will you have food at an event when certain students are fasting due to religious commitments and beliefs?
In the month of December, will you have a Christmas party (while not acknowledging the other religious celebrations during the month)?
The U.S., along with its practices and traditions, has been heavily influenced with Christianity. Be aware of how these beliefs have been engrained in your actions and ways of thinking, especially around the beliefs of other people.

Have you considered diverse racial and/or ethnic populations in your programming?
Will your event attract people of different races and/or ethnic groups?
Will your event culturally affirm, or demean, people of diverse racial and/or ethnic groups?
Does your advertisement indicate, whether in pictures or words, that this event will be appreciated by people of different races or ethnic groups?
Do not program as if the people in attendance will be of one particular race or ethnic group.

Have you considered the needs of students with disabilities in your programming?
Is the activity location accessible by wheelchair?

If you are having a speaker, will there be an American Sign Language 'Interpreter'?
If you are passing out handouts, are fonts large enough for individuals with seeing impairments?
Do not assume that all students are (temporarily) able-bodied.

Have you considered the economic limitations faced by some residents in your programming?

Does it cost money to attend ALL activities planned?
Are scholarships available for students who cannot afford to attend the planned event?
Do not assume that all students can afford to attend your program.

Have you considered the heterosexual bias and diverse sexual orientations of residents in your programming?
Does your advertising and dialogue before and at the program assume that all participants are heterosexual? For example, at a Valentine's Day Dance, have you said that same sex couples will be welcome?
Do not assume that all students are straight.

Event Planning Timeline

NOTE: This timeline is to be used to spark ideas and reminders for you to create your own timeline specifically tailored to your needs. Please keep in mind that every college/university maintains deadlines that may in all likelihood be different than the ones appearing here. Also note that many of the items can be done in advance of their deadline, or, if in a rush—after they should have been completed.

One Semester in Advance

- Survey students
    - Beyond board/committee and friends
    - Do you have a target audience built-in?
    - Phone/paper surveys – consider raffle
    - Use event evaluations to solicit more ideas
- Review past program evaluations and reports
- Establish budgets
- Determine audience: campus-only, open to general public, all-ages, family, etc.
- Choose events
    - Does it meet your mission?
    - Does it move your organization forward?
    - Does it serve/help your target audience?
- Choose event coordinator
- Check other calendars for conflicts
    - Your own organization
    - Other student organizations (Greek-letter organizations, governing organizations, etc.)
    - Athletics
    - Scheduling office
    - Buildings and grounds
    - Academic calendar (Avoid finals, Spring Break, etc.)
    - Holidays (school, religious (more than just Christian))
- Reserve locations/venues (include as many details as possible – and remember that the earlier submitted = the more likely you'll get your first choice!)
    - Reserve rain location for outdoor events
    - Green room (offstage preparation area)
    - Dressing room(s)
- Contact agent/performers – get all necessary information, but be careful not to verbally commit to anything
- Consider liabilities/risk associated with event
- Identify possible co-sponsors
- Decide upon need for tickets, costs
- Consider people power needed for event – be realistic with your resources
- Create event checklist/calendar with specific dates and people responsible for each item on list

Two-Three Months in Advance

- Contract performers **NOTE:** Contracts are sometimes-complicated legal documents. DO NOT sign any contract, or agree verbally without appropriate permission from your advisor. Some performers require much more advance booking than others.
- Reserve housing for performers
- Obtain meal tickets/plan for performer meals
- Order supplies
    - Decorations
    - Tickets
    - Wristbands
    - Raffle tickets
    - Flowers
    - Awards
    - T-shirts
- Identify target marketing groups
- Identify/contract ticket outlets
- Get information to University PR/Information Office

Event Planning Timeline

One Month in Advance

- Start promotion for event – announcements to media, teaser campaign
- Confirm housing and meals – retain confirmation numbers
- Arrange for performer payment with campus Accounts Payable office
- Review Technical Rider
- Arrange all Technical Considerations
    - Sound – microphones, tape decks/CD players, amps, speakers, cords, stands
    - Lights – bulbs, dimmers, wiring, gels
    - Staging – platforms, seating for audience, caution tape
    - Special needs – projectors, screens, recording equipment, musical instruments (piano will need to be tuned), music stands, lecterns, furniture (couch, side table, etc.), mats, access to water
- Meet with supervisor/tech director for space to ensure equipment is working and will meet performer needs
- Rent additional equipment
- Order food for event
    - Backstage refreshments
    - Meals for performer(s)
    - Meals/snacks for crews
    - Concessions
    - How many people do you expect to attend?
    - What can you afford?
    - Meet with campus catering to arrange food order
    - Complete appropriate forms
    - Seek donations if appropriate
    - Don't forget vegetarians
- Confirm security
- Arrange for parking
- Talk with campus media for advertising and coverage of event
- Contact other local media
- If open to public, contact other local schools, organizations, etc.
- Start determining staffing needs – be specific with duties and responsibilities
- Use committees – delegate responsibility and authority
    - PR Crew
    - Photographer
    - Ticket-takers
    - House Manager, ushers, box office
    - Concessions
    - Security
    - Load-In Crew/Grips
    - Load-Out Crew/Grips
    - Runners/Go-fers
    - Electrician
    - Sound Board
    - Spotlight Operators
    - Film Projectionists
    - Master/Mistress of Ceremonies
    - Welcome Committee, Guest Liaison(s)/Host(s)
    - Driver(s)
- Delegate creation of signage needed
    - "No photos/recording devices"
    - Directional signs
    - Sponsorship banners including board/committee banner
- Design Marketing Campaign/Publicity – vitally important!
- Complete Program Checklist Form

Event Planning Timeline

Three Weeks Before

♦ Distribute promotional materials/advertising
♦ Pick up supplies (obtain cash advance if necessary/able)
♦ Start ticket sales
♦ Finalize volunteer staff (you can not do it all!)
♦ Create access badges/passes and list of recipients

Two Weeks – One Week Before

♦ Second round of promo
♦ Word of mouth promotion campaign
♦ Pick up performer's check – lock in safe place
♦ Confirm all details with agent
♦ Send performer information pack
♦ Make sure all board/committee members and volunteers will be attending the program
♦ Gather performer welcome pack materials

Day of Event

♦ Get there early - make sure supplies are ready to go
♦ Place signs and decorations
♦ Hand out flyers/handbills
♦ Everyone wear committee/board/event t-shirt if possible
♦ Make sure someone is at venue to greet guest if they are driving in on their own
♦ Make sure all appropriate persons are there for sound check (security, performer, tech crew), provide water/soda/juices if possible
♦ Make sure all volunteers are in place
♦ Don't forget check(s)
♦ Keep talking up the event
♦ Make sure performer is introduced at beginning and thanked at end of program
♦ Provide water for stage
♦ Keep event on schedule
♦ Make sure volunteers have breaks if they are working entire event (delegate this responsibility)
♦ Clean-up following performance
♦ Inventory equipment and assess damage for repairs and reordering (such as light bulbs)

Post-Event

♦ Return all rented or borrowed equipment
♦ Remove all advertising displays and posters
♦ Settle with all ticket outlets
♦ Turn in receipts
♦ Deposit cash
♦ Restock/order supplies if necessary
♦ Thank advisor, members, volunteers, etc. for job well done
♦ Send thank-you's to agent, performer along with photos and letter of recommendation if appropriate
♦ Clip and send reviews to agent or performer
♦ Jot down notes for file and future programs
    Attendance, budget with receipts
    Whether program met goals
    Strengths, weaknesses
    Personal and audience response to performer
    Copies of thank-you's, reviews, evaluations
    Recommendations for new procedures, additions to event checklist, etc.
♦ Complete program evaluation/summary form – ideally with input of committee and volunteers

Event Report

Event _____

Date _____ **Time** _____

Location _____

Coordinator(s) _____ _____

Area of Focus _____ _____

Attendance (total) _____ **Attendance (Specifically Targeted Students)** _____

Cost (total) _____ **Cost (from Budget)** _____ **Cost (to students)** _____

Partners: Faculty ___ Student Gov't. ___ Student Leadership ___ Housing ___ Other _____

Description of Event:

_____

_____

_____

SWOT Analysis (What are the **S**trengths and **W**eaknesses of the event? What are the **O**pportunities you had and what were the **T**hreats to your success?)

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>

How does this program enhance the academic environment of the College?
(Keep in mind: faculty involvement, intellectual peer dialogues, academic support services, and academic wellness)

How does this program enhance the general social environment of the College?
(Keep in mind: community expectations, community development, peer to peer connections, etc.)

How is this program inclusive of all members of the College?
(Keep in mind: issues related to gender, religion, race/ethnicity, ability, class, and sexuality)

How do you feel this event went? What would you do differently?

How did you utilize Partners in the event process?

Would you recommend this event to next year's Chair? Why?

Other comments?

Publicizing Your Event

The following tips may be helpful in publicizing your opportunity or event. Use some, or use them all--just make sure to get special permission when required.

ON-CAMPUS

♦ Contact your PR person for a press release.

♦ Explore digital means of
♦ spreading the word: webpage buttons or pages, video bulletin boards, kiosks, message of the day on computers, emails, etc.

♦ Contact the campus & local newspapers for placement in their calendar of events.

♦ Create flyers for posting on campus bulletin boards. Get approvals as necessary.

♦ Write a note on classroom wipeboards / chalkboards.

♦ Contact campus or local radio and ask if they'd donate a PSA (public service announcement).

♦ Purchase professionally created posters.

♦ Chalk sidewalks in prominent locations around campus.

♦ Create an phone distribution list of all on-campus phone numbers. Make one call and contact everyone on campus (including the residence halls) regarding your event.

♦ Create table tents for display. (Please get approval first).

♦ Have a display or table in one of the academic buildings with free giveaways.

♦ Go to a department head or faculty / staff meeting, or directly contact faculty / staff to make sure they know about your event. They may announce it in class!

♦ Have a mini-event as a teaser in the middle of the cafeteria, in a class (get instructor permission first), or in an academic building lobby area.

♦ After getting a building supervisor's permission, use masking tape on the floor to spell out the details of your event (just like indoor chalking!)

♦ Get permission from food service to tape flyers to food trays.

♦ Order food from Food Services as an enticement for students to come to the event, or give away door prizes for those who stay throughout the event. Make sure to promote these opportunities!

♦ Obtain permission from residence life or campus to place postcards in residents' mailboxes. No need for a stamp!

♦ Announce your event in your classes.

♦ Create postcards and sent via US Mail.

♦ Use A-frame boards around campus to display with posters around campus.

♦ Go to other organizational meetings to announce your event. Make sure student Senators know about your event & publicize it to their constituents.

COMMUNITY

♦ Create flyers for posting in the community. Grocery stores, churches, daycare centers, department stores, bars, laundry mats, and other high-traffic establishments are good, depending on whom you are targeting.

TIPS FOR EVERY-WHERE

♦ Word of mouth is important! Get people excited about your event. Talk it up and involve others.

♦ Create mini handbills to hand out.

♦ Purchase balloons with your information printed on them, or take the cheaper route, and write on balloons, then blow them up.

♦ Use BIG posters (ie, butcher paper) or odd sizes to catch peoples' attention.

♦ See if your presenter has professionally made posters you can use for free. You may need to write dates, times, and locations, on them.

♦ Create a webpage to specify details of your event (then make sure to publicize the webpage!).

♦ Purchase professionally made stickers, or make them yourself with sticker kits (available at most discount stores), or with Avery labels through your laser printer!

♦ REMEMBER--People LOVE to be in the know, they love freebies, and you can't beat free food!

Information provided by Shana Warkentine Meyer, K-State at Salina

Officer Transition

One of the most important functions of an advisor is to assist in the transition from one set of organization officers to the next. As the stability of the organization, the advisor has seen changes, knows what works and can help maintain continuity. Investing time in a good officer transition early on will mean less time spent throughout the year nursing new officers through the quarter.

The key to a successful transition is making sure new officers know their jobs **BEFORE** they take office. Expectations should be clearly defined. There are a number of ways to conduct the officer transition. The following examples demonstrate two commonly used methods.

The Team Effort

The team effort involves the outgoing-officer board, the advisor, and the incoming-officer board. This method involves a retreat or series of meetings where outgoing officers work with incoming officers on:

1. Past records/notebooks for their office and updating those together
2. Discussion topics should include:
- Completed projects for the past year.
- Upcoming/incomplete projects.
- Challenges and setbacks.
- Anything the new officers need to know to do their job effectively.

The advisor's role may be to:
♦ Facilitate discussion and be a sounding board for ideas.
♦ Organize and provide the structure of a retreat.
♦ Offer suggestions on various questions.
♦ Refrain from telling new officers what they should do.
♦ Fill in the blanks." If an outgoing officer doesn't know how something was done, or doesn't have records to pass on to the new officer, you can help that officer by providing the information he or she doesn't have.

The structure of a team effort retreat can take many forms. The advisor's role in this process is to provide historical background when needed, help keep goals specific, attainable and measurable and provide advice on policies and procedures.

One-on-One Training, Advisor with Officers

While it is ideal to have the outgoing officer team assist in training the incoming officers, often it is left up to the advisor to educate the incoming officers. In that situation, there should be a joint meeting of the new officers, as described in section 4 of the above outline. After that meeting, the advisor should meet individually with each officer; examine the notebook of the previous officer (or create a new one).

Things to include in a new notebook:
1. Any forms the officers may need to use
2. Copies of previous meeting agendas
A copy of the organization's constitution and bylaws

Talk about what the officers hope to accomplish in the forthcoming year. Assess the officer's role in the organization. What are the expectations of each position? What are the student's expectations of the position and his/her goals?

Information provided by Jim Mohr, Advisor for Student Organizations and Greek Life, Eastern Washington University

Retreats

WHY SHOULD YOUR ORGANIZATION HAVE A RETREAT/WORKSHOP?
Organization retreats and workshops enable student organizations to briefly get away from the distractions of school and work and to focus on the needs of the organization and the needs of the individual members of the organization. Planning for the future will enable an organization to operate more efficiently. By setting goals and planning together, members of an organization can operate more effectively as a team.

ESTABLISH THE PURPOSE FOR YOUR RETREAT
Team Building, Skills Training, Communications, Goal Setting, Problem Solving, Planning, Learning, Orientation, Socializing, Transition, Revitalization, Conflict Resolution

DETERMINING WHO THE RETREAT IS FOR
New Officers, Executive Board, All Organization Members, etc.

SELECTING A FACILITY
On Campus or Off Campus; convenience vs. isolation; Urban or Rural Getaway. When looking for an off campus retreat location consider nearby summer camps. They often charge cheap rates in the off season. Be sure to check availability, accessibility, and accommodations. Don't forget about costs and contracts. The Office of Student Life has contact names and numbers for retreat locations.

TRANSPORTATION
If your event is off campus, members should be provided with adequate and safe transportation.

FOOD AND DRINK
Before deciding on a menu consider cost, cooking facilities, preparation and clean up. Try cooking together it makes a great team building activity. On a tight budget? Consider potluck.

SELECTING THE BEST FORMAT
-Workshops presented by an "expert" -advertising, program planning, public speaking, fund-raising, etc.
-Experiential Exercises- team building, brainstorming, communications skills, ropes course, etc.
-Recreational Exercises, skiing, hiking, canoeing, biking, etc.

SELECTING THE FACILITATORS AND PRESENTERS
Organization Officers, Organization Members, Faculty Advisor, Other Faculty Members.

PLANNING THE RETREAT
Have members sign up to participate on committees. Remember people support what they help to create.

Suggested committees: Transportation, Food/Drink, Lodging, Recreation, Programming, Clean-Up

RESOURCES IN DEVELOPING YOUR WORKSHOPS AND EXERCISES

Structured experiences books, reference books, videotapes; Faculty Advisor; Faculty Members

EVALUATING YOUR RETREAT
Evaluation Forms. Ask members what they thought of the experience. What would they change? What would they keep the same? Ask the presenters what they thought of the experience. What could have made it better?

Sample Retreat Schedule—Underwater Basketweaving Club—Organization Retreat

What To Bring: Sleeping bag or linens and blanket pillow. Clothes that can get dirty! Comfortable walking shoes. Your imagination! Towel and personal toiletries. A hat of any kind. Cross country skis (if you have them-let Reed Wood know if you need skis).

Travel Information: We will meet in the College Center Parking Lot at 8 a.m. on Saturday, February 22. We will return to campus at 5:00 p.m. on Sunday, February 23.

Agenda:

DAY ONE

8:00 a.m.	Depart College Center
9:30 a.m.	Arrive Hynds Lodge
10:00	Icebreaker
10:30 a.m.	Communication Skills Exercise
Noon	Build our own Sandwich Lunch
1:00p.m.	Icebreaker/Energizer
1:15 p.m.	Creativity Exercise
3:15 p.m.	Free Time
4:30	Pizza Bake
5:30 p.m.	Sing for your supper-wear your hat
6:15 p.m.	Free time (except for the clean-up crew)
6:45 p.m.	Energizer
7:00 p.m.	Team Win Lose or Draw/Pictionary
8:30 p.m.	Free time-Good night

DAY TWO

8:30 a.m.	Breakfast
9:00a.m.	Cross Country Ski Wake up
11:00a.m.	Icebreaker
11:20a.m.	"The Basketweaving Tradition" Woody Birch, local artist
Noon	lunch
1:30p.m.	Goal Setting and Action Planning for the year
2:45 p.m.	Closing
3:00p.m.	pack van for 3:30 p.m. departure

SAMPLE RETREAT SCHEDULE—TEAM EFFORT

Icebreakers and team-builders

1. Officer meetings
♦   New/old officers pair off (president with president, treasurer with treasurer)
♦   Update each section of notebooks, or talk about what should go in a new one. If officers do not have a notebook, take the time to create one!
Each pair of officers should discuss the following:

    Who did the outgoing officer interact with most in the administration, in the community, and other student organizations?
    With the departments/areas listed above, what capacity did the outgoing officer work with them on?
    What University paperwork is this position responsible for completing?
    What did the outgoing officer have to do with the organization's funding requests (assuming this question applies to your group)?
    What University procedures did the outgoing officer have the most trouble with and how can the incoming officer avoid those troubles?
    What were the biggest challenges the outgoing officer faced and how did they overcome them?
    What goals did the outgoing officer have, and which were achieved and which were not.

2. Joint officer meeting
•   Gather as a group; write everyone's notes on a board or flip chart. Note similarities.
•   Generate a discussion on similarities, challenges and how challenges can be overcome.
Review policies.

3. New officer meeting (This could be a separate meeting, or the next phase of the retreat.)
•   Goal review. What did the past officers accomplish?
•   What is left to do from the past goal list? Revise list or eliminate it if the officers choose.
•   Provide new officers time to list goals for their position on their own.
•   Reassemble and share updated goals.
•   Brainstorm new goals for the organization and ideas for programs, fundraisers, and social events.
    Make an exhaustive list of everything the group could possibly accomplish.
    Narrow down that list to what they can reasonably accomplish. Assign tasks to specific officers. If no one wants to do it, take it off the goals list.

Student Organization Officer Roles

Each student organization writes its own constitution and bylaws, which should outline the basic role of each organization officer. It is solely up to the members of the organization to assign responsibilities to a specific officer. This reviews some possible position responsibilities. It is intended to assist you in constitutional development and to help you answer the question, *"Now I've been elected, what am I suppose to do?"*

Although a student organization's constitution lists some specific positions' responsibilities, each officer should have the freedom to personalize his/her office. Individual interest areas and skills often dictate the amount of time an officer spends on a particular responsibility. However, a good officer never forgets what the basic responsibilities are.

Role of the President
Some Potential Responsibilities
Presides at all meetings of the organization
Calls special meetings of the organization
Schedules all practices, classed, and other activities of the organization
Obtains appropriate facilities for organization activities
Prepares and files any report required
Appoints committee chair people
Completes annual Recognition Forms
Attends Recognized Student Organization Meetings
Represents organization at official functions
Maintains contact with organization advisor
Maintains contact with organization alumni
Maintains contact with affiliated department or section
Maintains contact with national organization
Remains fair and impartial during organization decision making processes
Votes in cases where there is a tie
Coordinates Organization elections

Role of the Vice President
Some Potential Responsibilities:
Assume the duties of the President as needed
Serve as an ex-officio member of standing committees
Plans officer's orientation and organizational retreats
Coordinates organizational recruitment efforts
Represents organization at official functions

Remains fair and impartial during organizational decision making processes
Coordinates organization elections

Role of the Secretary
Some Potential Responsibilities:
Keeps a record of all members of the organization
Keeps a record of all activities of the organization
Keeps and distributes minutes of each meeting of the organization
Creates and distributes agendas for each meeting of the organization
Notifies all members of meetings
Prepares organization's calendar of events
Schedules all practices, classes, and other activities of the organization
Obtains appropriate facilities for organization activities
Prepares and files any report required
Handles all official correspondence of the organization
Manages organization office space
Collects organization mail from the advisor or wherever mail is received
Represents organization at official functions
Remains fair and impartial during organization decision making process
Coordinates organization elections

Role of the Treasurer
Some Potential Responsibilities
Keeps all financial records of the organization
Pays organization bills
Collects organization dues
Prepares and submits financial reports to the members
Prepares an annual budget
Prepares all budget requests for funds
Is familiar with accounting procedures and policies
Advises members on financial matters (i.e. vendors, ticket selling procedures)
Coordinates fund raising drive
Represents organization at official functions
Remains fair and impartial during organization decision making processes

Other possible positions:
Parliamentarian, Activities Director, Recruitment / Retention Director, Academic Coordinator, Liaisons, Community Service Director, etc.

Parliamentary Procedure

What is Parliamentary Procedure?
Parliamentary procedure is a set of rules for conducting meetings. It allows for everyone to be heard and to make decisions without confusion.

Today, *Robert's Rules of Order, Newly Revised* is the basic handbook of operation for most clubs, organizations, and other groups. *Robert's Rules* can be found in most libraries.

A Very Abridged Version of *Robert's Rules*
The degree of order needed at a meeting is dependent upon the size and purpose of the group. The following are some basics of *Robert's Rules of Order*, which may be helpful for groups that need a degree of normality in conducting business.

The Motion
You may make a motion when you want the group to take some action: to send a letter, to accept a report, to hold a special meeting, to spend money for some special purpose, etc.

Introduce the motion by saying, "I move that," followed by a statement of the proposal. You cannot discuss the motion until someone has seconded it. This is done to reduce the number of discussions on a subject in which no one else in the group is interested.

The Amendment
Amendments are offered in the same way as a motion. You may offer an amendment when you agree substantially with the motion which has been made but want to make some changes before it is adopted.

Amending the Amendment
Just as a motion may be amended, an amendment may also be changed in the same way. As with the first amendment, the second amendment must relate to the motion and the amendment. It is in order only when it relates to both. No more than two amendments may be made to one motion.

Substitute Motion
The substitute motion is sometimes used when there is a motion and two amendments on the floor in order to save the time of the meeting. If there does not seem to be substantial disagreement with the motion and the two amendments, a substitute motion incorporating all three into one motion may be made and accepted by the chair.

Note: If you disagree with a motion or an amendment, you do not defeat it by trying to change the sense of the motion through amendment. You speak against the motion or amendments and urge the membership to vote against them. Then new motions calling for different action may be made and considered.

Speaking on Motions and Amendments
When you want to speak at a meeting, you raise your hand and ask the chair for the floor. As soon as you are recognized by the chair, you may proceed to speak either for or against the motion or amendments being considered.

When several members wish to speak at the same time, these guiding principles should determine the decision of the chairman:

1. The chairman should show preference to the one who made the motion.
2. A member who has not spoken has first choice over one who has already spoken.

If the chairman knows the opinions of members discussing the measure, he/she should alternate between those favoring and those opposing it.

Motion to the Table
If you wish to postpone or end debate on an issue, you may also make a motion to table. Such a motion is not debatable, and if it is seconded by one other member, the motion must be put to an immediate voted by the chair. The chair may discuss the reason for tabling with the member.

Parliamentary Procedure

Calling a Question

In order to speed up the meeting and eliminate unnecessary discussion, a member can "call the question." The chair will call for dissent. If you want the motion to be discussed further, raise your hand. If there is no dissent, voting on the motion takes place.

Voting

Voting on a motion can be as formal as using written ballots or as casual as having the chair ask if anyone objects to the motion. The most common practice is to call for a show of hands or a voice vote of ayes and nays. Only members present at the time may vote unless the rules of the organization allow for proxies or absentee ballots.

A simple majority of votes cast will pass most motions. During elections when more than two candidates are running for an office, your organization rules should specify whether a majority or plurality is necessary. These rules can also call for other requirements depending on the issue on which the vote is held.

When the Chairperson Can Vote

Assuming that the chairperson is a member of the organization, he/she has the right to vote whenever a written or secret ballot is used. With any other method of voting, to protect the impartiality of the chair, he/she should vote only when it will change the outcome.

Point of Information, Of Order

If at any time during the meeting you are confused about the business being discussed or if you want the motion that is being considered more clearly explained, you may rise to ask the chairman for a point of information. After you are recognized, ask for the explanation which you desire.

If you disagree with any of the chair's rulings, or if you believe that the person who is speaking is not talking about the business being considered, you may raise a point of order and state your objection to the chair. The chair then is required to rule one way or another on your point of order.

Note: This section of the *Advisors Handbook* does not pretend to cover all situations or answer all questions. It is meant to introduce you to some basic information which will suit many groups' needs.

All parliamentary procedure information provided by Office of Student Leadership Development Programs at East Carolina University

Parliamentary Procedures at a Glance

Here are some motions you might make, how to make them, and what to expect of the rules.

TO DO THIS:	YOU SAY THIS:	MAY YOU INTERRUPT THE SPEAKER?	DO YOU NEED A SECOND?	IS IT DEBATABLE?	CAN IT BE AMENDED?	WHAT VOTE IS NEEDED?	CAN IT BE RECONSIDERED?
Adjourn Meeting	"I move that we adjourn."	NO	YES	NO	NO	MAJORITY	NO
Call an Intermission	"I move that we recess for…"	NO	YES	NO (1)	YES	MAJORITY	NO
Complain About Heat, Noise, Etc.	"I rise to a question of privilege."	YES	NO	NO	NO	NO VOTE	NO
Temporarily Suspend Consideration of an Issue	"I move to table the motion."	NO	YES	NO	NO	MAJORITY	NO (2)
End Debate and Amendments	"I move the previous question."	NO	YES	NO	NO	2/3	YES (3)
Postpone Discussion For A Certain Time	"I move to postpone the discussion until…"	NO	YES	YES	YES	MAJORITY	YES
Give Closer Study of Something	"I move to refer the matter to committee."	NO	YES	YES	YES	MAJORITY	YES (4)
Amend a Motion	"I move to amend the motion by…"	NO	YES	YES (5)	YES	MAJORITY	YES
Introduce Business	"I move that…"	NO	YES	YES	YES	MAJORITY	YES

↑ The motions listed above are in order of precedence.   ↓ Below, there is no order.

Protest Breach of Rules or Conduct	"I rise to a point of order."	YES	NO	NO	NO	NO VOTE (6)	NO
Vote on a Ruling of the Chair	"I appeal from the chair's decision."	YES	YES	YES	NO	MAJORITY	YES
Suspend Rules Temporarily	"I move to suspend the rules so that…"	NO	YES	NO	NO	2/3	NO
Avoid Considering an Improper Matter	"I object to consideration of this motion."	YES	NO	NO	NO	2/3 (7)	YES (8)
Verify a Voice Vote by Having Members Stand	"I call for a division, " or "Division!"	YES	NO	NO	NO	NO VOTE	NO
Request Information	"Point of information…"	YES	NO	NO	NO	NO VOTE	NO
Take Up a Matter Previously Tabled	"I move to take from the table…"	NO	YES	NO	NO	MAJORITY	NO
Reconsider a Hasty Action	"I move to reconsider the vote on…"	YES	YES	YES (9)	NO	MAJORITY	NO

NOTES:

(1) Unless moved when no question is pending.
(2) Affirmative votes may not be reconsidered.
(3) Unless vote on question has begun.
(4) Unless the committee has already taken up the subject.
(5) Unless the motion to be amended is not debatable.
(6) Unless the chair submits to the assembly for decision.
(7) A 2/3 vote in <u>negative</u> is needed to prevent consideration of main motion.
(8) Only if the main question has not been debated yet.
(9) Unless the motion to be reconsidered is not debatable.

Membership and Recruiting

New members are the lifeblood of every organization. They bring new ideas, increase the organization's person power, foster organizational growth, prevent member bum out, and take over leadership roles when you leave.

People join organizations for many reasons. They want to get involved, meet people and make new friends; they want to develop skills and have fun. Groups need new members because they bring new ideas and talents, in addition to replacing old members. It is vital that an organization has a well-conceived and executed recruitment and retention plan.

Recruitment and Retention is the responsibility of every member of your organization! Every member must be involved in the planning and implementation of a recruitment and retention campaign. Some organizations create a Membership Development Committee that oversees the design and implementation of a recruitment campaign, maintains membership information, plans and implements members training programs, coordinates the leadership selection/election process and plans social functions to enhance team building.

The following suggestions will help make your organization's recruitment efforts more successful:

Know and Understand Your Organization
It is important that both the leadership and the membership know what the organization goals and objectives are.
- Have an organizational meeting to discuss goals and objectives. Are your goals still accurate? Is it time to update them? Where do you plan for the organization to be in six months? A year?
- Decide on a direction to take. During this "organizational housekeeping" process, a certain theme or direction should become clear. What is this?
- Develop a membership profile. What type of people do you need to help the group succeed? Who would you like to have join? Who would complement your current membership?

Set Recruitment Goals
Now that you know the type of people you are interested in recruiting, the next step is to set some recruitment goals. How many new members can your organization reasonably assimilate into the group? Will you allow people to join at any time or only during a pre-designated recruitment period? Will you hold a mass meeting or is membership by invitation only?
- Keep your membership profile in mind. When designing your recruitment strategy, ask yourself what places do these prospective members most likely frequent? Do they have special interests? What kind of publicity would attract their attention?
- Remember what made you get involved. Probably the most important step in designing a recruitment strategy is for you to think back to when you first became involved. What attracted you? How were you recruited? If you weren't, how did you hear about the group? Why have you stayed involved?

Get Everyone Involved
Have your current members identifying people they know who might want to get involved. Personally invite them to attend a meeting. Word-of-mouth is the best and least expensive type of publicity you can use.
- Talk about your group. Tell people what you have to offer them. Ask them about themselves – and really listen.
- Sell your organization and the benefits of membership. Tell them how the organization can benefit someone like them. Personalize the message to each potential member. Let them know how their talents, skills, and interests would help the organization.

Design an Advertising Campaign Using Visual Elements
Recruitment campaigns need to have a visual element as well. Have those members with artistic talents work on your posters, flyers, banners, bulletin boards, etc. Be creative. Get the publicity up early enough. (Read the section in this handbook regarding Publicity and Promotion to make your publicity as effective as possible.) Your publicity can be effective only if it's noticed.

Plan a Special Welcoming Meeting
Many groups find it beneficial to have a meeting or ceremony to welcome new members. Group participation in some form of official initiation process is one way to make your members feel wanted, needed and appreciated.

Hold an Orientation for New Members
Developing and conducting an organizational recruitment campaign is very important. Yet, as we all know, retaining these new members is another matter entirely.
- Don't make a mistake – Train your new recruits. All to frequently, groups skip any form of orientation and just place their new recruits directly on committees or organizational projects.
- Teach them about your organization. Although involvement is crucial to the longevity of the group, understanding the organization and its goals and objectives, structure, norms, and taboos is equally as important. By taking the time to orient new members to the privileges and responsibilities of membership, you create a more educated membership – people who can and will make significant contributions to the organization.
- Elements of a successful orientation program:
  The rights and responsibilities of members
  Organizational governance, operating policies, and procedures
  Organizational history, traditions, and programs
  Assimilation of new members into the organization
  An overview of campus services, activities, programs for student organizations
  Information about any support groups or affiliations a group may have

Adapted from Ball State University Downloads for Student Organizations and Advisors

Recruitment Tips and Suggestions

- Set up a series **of Informational Meetings.**
- Create a **Brochure** that will answer questions and serve as a resource.
- Develop a **Slide Show** that will "Tell the Whole Story."
- Set up Informational **Tables** in the Wyoming Union.
- Contract those new students who requested information about your organization by way of the **RSO Preference Checklist.**
- Request lists or labels of target groups from Student Activities. (**Direct Mail** to target groups. **Call** and invite target groups to your meetings and events.)
- **Reach** out to **UW Staff and Faculty** who will encounter students searching for involvement - Residence Halls, Career Services, Academic Departments, etc.
- Get an article in **The Branding Iron** about your organization. Advertise in the Branding Iron.
- Set up a Recruitment Table at every event you sponsor. +\' Ask each current member to **Bring a Friend** to your next meeting.
- Make **Announcements** at all of your programs.

Retention Program—Tips and Suggestions

Have a Retention Campaign. Continually recruiting and training new members takes a lot of time and energy. Set new members up for continued involvement. An Incorporation Packet gives new members information about the organization and current members information about the new members.

Incorporation Packet
Interest Form –
Personal data, skills, experience, expectations, class/work schedule, interest areas
Statement of Organizational Philosophy and Goals -
Copy of Constitution. Description of what your organization does, for who, and why.
Committee and Position Description –
Should be specific without limiting creativity and individuality.
Organizational Flow Chart –
Shows leadership positions. Helps people understand how the organization functions.
Analyze the needs of your members. Remember why people get involved in the first place and then meet those needs.

Adapted from Thundar Bolts, NDSU

Recruitment Tips

- Remember that a personal contact is always better than 1000 flyers and newspapers advertisements. People join organizations because they like the people they find there. Nothing can replace the simple act of getting to know someone and asking them to join the organization.
- Get scheduled to make a brief introduction of your organization at each floor meeting.
- Co-sponsor campus events so that the HGB name gets out there more. Be sure to have information about the HGB at each event.
- Ask key people to give recommendations of possible members and leaders. These recommendations can come from RAMAs, CAs, or other hall leaders.
- Don't expect a person to come to a meeting in a room full of people he/she doesn't know. Offer to meet the student somewhere and go to the meeting together. Then make sure you personally introduce that person to others in the group.
- Have a membership drive.
- Feed potential members. College students are attracted to free food.
- Recruit people by the issue that interests them. There are people very interested in one issue, you can recruit them to head up a program on that issue.
- When someone has expressed an interest in getting involved to any degree in your organization, immediately get them involved and give them a meaningful task to do.
- Go out of your way to make new members or potential members feel like "players" right away.
- Go door to door in the residence hall and talk to students about the organization and invite them to come to an event later in the week.
- Get exclusive rights to a really cool "members only" job for the organization.
- Hold meetings and events in comfortable, visible, easy-to-come-to places.
- Make a list of all of the advantages of being a member. This could include public speaking opportunities, or any number of other things. Use this list of advantages as your major selling points for new members.
- Always take photos at meetings and events, then put together a scrapbook for prospective members to see.
- Create a display that you can set up in the hall.
- When working to recruit members, always try to think in terms of "what's in it for them."
- Have an informational meeting.
- Rent a video camera and make your own recruitment video. Its ok if it's amateur and sloppy, just make it funny! Show your group members at an event. Show a few minutes of a typical meeting. Show your members hanging out, playing cards. Whatever! The more hilarious, the better.
- Print up business cards for your members to carry. Be sure to have a place for members to write his/her own name and number, but the card should also say, "Open meetings! Please come!"

From Dathe, T. and Tumbarello, T. "Advising 101" UMR-ACUHO, 1999

Motivation

What do others want?

It is NOT money or personal gain that most people want. They want intrinsic satisfaction. People will work harder for intrinsic satisfaction than they will for monetary income. The following are some ways that you as a leader can help people satisfy those intrinsic needs:

People Need to Feel Important
See people as worthwhile human beings loaded with untapped potential; go out of your way to express this attitude.

Give Praise
Reinforce for continual achievement. All people need praise and appreciation. Get into the habit of being "praise-minded." Give public recognition when it is due.

Give People Status
The more status and prestige you can build into a committee or an organization, the more motivated the members become. There are many status symbols you can use to make others feel important. For example, develop a "Member of the Week/Month" Award or "Committee Chairperson of the Month" Award. In addition, simply treating people with courtesy is a way of giving them status.

Communicate
People like to know what is going on in the organization. They want to be told about problems, objectives, and "inside information." They feel recognized and important when they are kept informed. Two-way communication within the organization is necessary in order to achieve a mutual understanding. Mutual understanding leads to motivation!

Give Security
People need more than financial security. People will look to you for intrinsic security. For example, they must know that you like them, respect them understand them and accept them not only for their strong points, but also for their weaknesses.

People Need You – People Need People
They need you to give them what they want and need: intrinsic satisfaction. When you give them what they want, they will give you what you want. This is what motivation is all about. It is not something you do to other people, but something they do for themselves. You give them the reasons and that makes you the motivator – a person who gets things done through others.

Develop Purpose
Always explain why. Instill in the members that their assistance is vital for success. Share ways that participation can encourage personal growth.

Encourage Participation in Group Goal Development
Include all members when planning goals. Consider and follow through on members' suggestions. Remember that we support that which we help to create.

Develop a Sense of Belonging
People like to belong. Those who feel like they belong will more likely invest themselves.

Specific Ways to Increase Motivation

· Give others credit when it is due them.
· Use "We" statements, and not "I."
· Play up the positive and not the negative.
· Make meetings and projects appear attractive and interesting.
· When you are wrong, admit it.
· Use members' names often.
· Let members in on the early stages of plans.
· Be fair, honest, and consistent – show no favoritism.
· Be careful what you say – do not gossip.
· Listen to others.
· Expect only the best and be proud when members achieve it!

Adapted from Ball State University Downloads for Student Organizations and Advisors

GRAPE Theory of Motivation

Growth Being able to increase one's skills and competencies, performing new or more complex tasks, participating in training programs.

Recognition Promotion within the organization, praise for achievements, positive and constructively critical feedback, receiving an award, printed references to an individual's activities, being "listened to."

Achievement The opportunity to solve a problem, to see the results of one's efforts, to reach goals that one has established to create a 'whole' tangible product.

Participation Involvement in the organizational decision making, planning and scheduling one's own work and controlling one's own work activities.

Enjoyment! Having fun in a warm, friendly, supportive atmosphere.
Adapted from Thundar Bolts, NDSU

Checklist to Personalize Your Manual

1. How to register a student organization / privileges
2. Alcohol policies
3. Use of university facilities
4. Fundraising
5. How to update student organization information
6. Policy / procedure manual for the campus (or where to find it)
7. Poster policy
8. Pr ideas
9. Trip approval forms
10. Student organization website information / forms
11. Account help / information
12. Crisis information
13. Info on awards banquets / recognition opportunities
14. Important dates
15. Offices / resources on campus
16. How to on: media services, dining services / catering; mail Services; printing requests; security requests; purchasing; room Reservations
17. Any special requirements your campus has of recognized groups
18. Phone list / contact info for important groups

Examples, Resources and Handouts

Index

20 Tips for Advisors to Increase Organizational Productivity

1. Know what the students expect of you as an Advisor.

2. Let the group and individual members know what you expect of them.

3. Express a sincere interest in the group and its mission. Stress the importance of each individual's contribution to the whole.

4. Assist the group in setting realistic, attainable goals. Ensure beginning success as much as possible, but allow the responsibility and implementation of events to lie primarily with the organization.

5. Have the goals or objectives of the group firmly in mind. Know the purposes of the group and know what things will need to be accomplished to meet the goals.

6. Assist the group in achieving its goals. Understand why people become involved. Learn strengths and emphasize them. Help the group learn through involvement by providing opportunities.

7. Know and understand the students with whom you are working. Different groups require different approaches.

8. Assist the group in determining the needs of the people the group is serving.

9. Express a sincere interest in each member. Encourage everyone to be responsible.

10. Assist the members in understanding the group's dynamics and human interaction. Recognize that at times the process is more important than the content.

11. Realize the importance of the peer group and its effect on each member's participation or lack thereof. Communicate that each individual's efforts are needed and appreciated.

12. Assist the group in developing a system by which they can evaluate their progress. Balance task orientation with social needs of members.

13. Use a reward system and recognition system for work well done.

14. Develop a style that balances active and passive group membership.

15. Be aware of the various roles that you will have: clarifier, consultant, counselor, educator, facilitator, friend, information source, mentor, and role model.

16. Do not allow yourself to be placed in the position of chairperson.

17. Be aware of institutional power structure—both formal and informal. Discuss institutional developments and policies with members.

18. Provide continuity for the group from semester to semester (not mandatory but encouraged).

19. Challenge the group to grow and develop. Encourage independent thinking and decision-making.

20. Be creative and innovative. Keep a sense of humor!

(Adapted from M.J. Michael)

Office of Student Leadership Development Programs at East Carolina University

Sample Student Organization Constitution and Bylaws
(Please modify to meet your organization's needs or develop your own)

GUIDELINES FOR CONSTITUTIONS

The following outline and questions are designed to help write a constitution for an organization. The constitution should contain statements concerning enduring aspects of the organization. Items that are subject to frequent revision should be included in the bylaws.

PREAMBLE
This section should be a statement of the group's establishment and purpose of the Constitution. The preamble should contain the name of the organization.

ARTICLE I. Name
Section 1.   What is the exact title to be used in addressing this organization? Please note, Wesley College may not be used in the title.

ARTICLE II. Purpose
Section 1   What is the purpose? Is it fostering a broad educational goal? Is it a social, cultural, or political aim? Why was the group founded?

Section 2.   This section should be a statement of the group's willingness to abide by established college policies.

ARTICLE III. Membership
Section 1.   Who is eligible for membership? Are there any restrictions? How does one become a member? How are members identified?

Section 2.   Voluntary withdrawal of membership may be provided for.

Section 3.   Nondiscrimination clause should be provided for and include the following: race, color, creed, sex, or sexual orientation.

ARTICLE IV. Officers
Section 1.   How many officers are there? What are their titles and duties? Will the officers constitute an executive committee? Description of any standing committees should be included, probably in the bylaws.

ARTICLE V. Operations
Section 1.   How are officers elected? What type of ballot? When are they elected, and for what period? Who is eligible for office? When do officers assume office? How may officers be removed? Clarify the role of the advisor.

ARTICLE VI. Finances
Section 1.   How will the organization finance its activities? Will the organization submit a budget to the SGA Finance Committee every semester?

ARTICLE VII. Amendments
Section 1.   How are amendments to be proposed and by whom? Should there be a delay before voting on amendments? How are the amendments to be voted upon?

Sample Student Organization Constitution and Bylaws
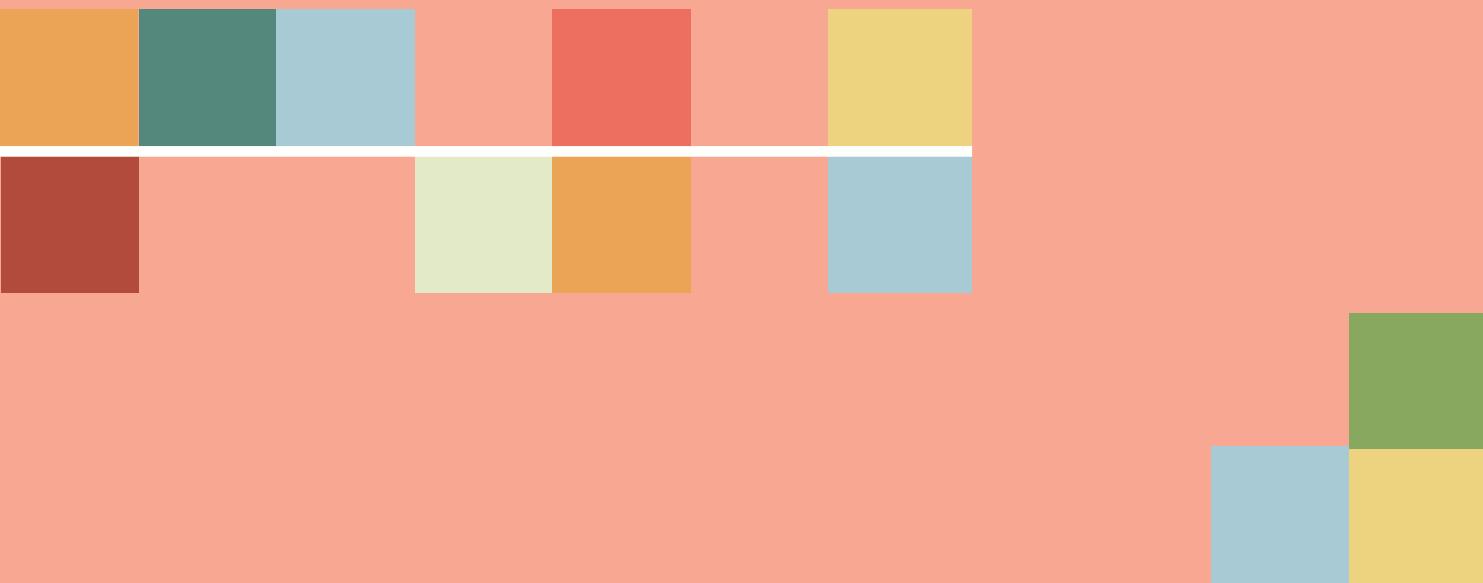
(Please modify to meet your organization's needs or develop your own)

BY-LAWS

By-laws are intended to deal with the day-to-day rules governing the organization. These might have to change in order to accommodate new conditions or circumstances. Hence, they should be reviewed and updated at least annually.

1. <u>Meetings</u>: Stipulate the frequency of meetings, possibly the day of the week, and even the time and location.

2. <u>Officers</u>:   List any additional duties or responsibilities assigned to the various officers, which have not already been covered in the constitution.

3. <u>Committees</u>:   Name any standing committees and the method to be used for selecting chairperson and committee members. State the duties and responsibilities of these committees. (Consider composition, appointment, function, power, duties, membership, financing and publicity).

4. <u>Financial</u>:   Provide for initiation fees, dues, and other assessments (if any); also details regarding delinquencies.

5. <u>Elections</u>:   State all elections rules and procedures not already covered in the constitution. Be sure to include procedures for filling vacancies and procedures for voting.

6. <u>Amendment of By-Laws</u>:   Stipulate the method for amending the By-Laws. The requirements for amending the By-Laws should not be as great as those for amending the constitution.

Information provided by Christine McDermott, Director of Student Activities, Wesley College

50 Ways to Give Recognition to Volunteers

- Smile
- Put up a volunteer suggestion box
- Treat to a soda
- Ask for a report
- Send a birthday card
- Arrange for discounts
- Give service stripes
- Treat to ice cream
- Plan annual ceremony occasions
- Recognize personal needs and problems
- Be pleasant
- Post honor roll in reception area
- Respect their wishes
- Give informal socials
- Keep challenging them
- Send a Thanksgiving card to the person's family
- Say "Good Morning"
- Greet by name
- Provide a pre-service training
- Help develop self confidence
- Award plaques to sponsoring group
- Take time to explain fully
- Be verbal
- Give additional responsibility
- Afford participation in team planning
- Respect sensitivities
- Enable to grow on the job
- Send newsworthy information to the media
- Say "Good Afternoon"
- Honor their preferences
- Create pleasant surroundings
- Welcome them to staff meals
- Have a public reception
- Take time to talk
- Defend against hostile or negative staff
- Make good plans
- Throw a pizza party
- Plan a theater party
- Recommend to prospective employer
- Utilize as consultants
- Praise them to their friends
- Say "Thank you"
- Smile
- Be a real person
- Plan occasional extravaganzas
- Send impromptu fun cards
- Attend a sports event
- Have a picnic

From Schreiber, V. and Pfleghaar, E. "Supervising vs. Advising", UMR-ACUHO, 1999

Advisor's Self-Evaluation Checklist

Please answer the following questions as they relate to your role as a student organization advisor. Fill in the blanks in front of each question using the following scale:

5 = all the time   4 = most of the time   3 = some of the time   2 = almost never   1 = never

_____ I actively provide motivation and encouragement to members.

_____ I know the goals of the organization.

_____ I know the group's members.

_____ I attend regularly scheduled executive board meetings.

_____ I attend regularly scheduled organizational meetings.

_____ I meet regularly with the officers of the organization.

_____ I attend the organization's special events.

_____ I assist with the orientation and training of new officers.

_____ I help provide continuity for the organization.

_____ I confront the negative behavior of members.

_____ I understand the principles of group development.

_____ I understand how students grow and learn.

_____ I understand the principles that lead to orderly meetings.

_____ I have read the group's constitution and by-laws.

_____ I recommend and encourage without imposing my ideas and preferences.

_____ I monitor the organization's financial records.

_____ I understand the principles of good fund raising.

_____ I understand how the issues of diversity affect the organization.

_____ I attend conferences with the organization's members.

_____ I know the steps to follow in developing a program.

_____ I can identify what members have learned by participating in the organization.

_____ I know where to find assistance when I encounter problems I cannot solve.

Advisor/Student Evaluation and Feedback Tool

Please take 15-20 minutes to share your thoughts on the questions and statements listed below. Your feedback is valuable to my professional development.

Please use a scale of 5-1 to rate your answers, 5 being the best score.

1) I am satisfied with the amount of time our advisor spends with our group   5 4 3 2 1
Comments:

2) I am satisfied with the quality of time our advisor spends with our group   5 4 3 2 1
Comments:

3) I am satisfied with the amount of information our advisor shares with our group 5 4 3 2 1
Comments:

4) I am satisfied with the quality of information our advisor shares with our group   5 4 3 2 1
Comments:

5) Our advisor is familiar with the goals of our group   5 4 3 2 1
Comments:

6) Our advisor advises our group in a way consistent with our goals   5 4 3 2 1
Comments:

7) Our advisor adjusts his/her advising style to meet our needs   5 4 3 2 1
Comments:

8) Our advisor is a good listener   5 4 3 2 1
Comments:

9) Our advisor understands the dynamics of our group   5 4 3 2 1
Comments:

10) Our advisor role models balance and healthy living   5 4 3 2 1
Comments:

11) Our advisor challenges me to think   5 4 3 2 1
Comments:

12) Our advisor allows me room to make and execute decisions   5 4 3 2 1
Comments:

Additional Comments (use the back of this sheet if necessary):

Resource provided by Jon Kapell, Associate Director of Campus Activities, Drexell University

The Role of Advisor Checklist

This form is designed to help advisors and student officers determine a clear role for advisors in matters pertaining to student organizations.

Directions: The advisor and each officer should respond to the following items, then meet to compare answers and discuss any differences. For any items, which are determined not to be the responsibility of the advisor, it would be valuable to clarify which officer will assume that responsibility. For each statement, respond according to the following scale:
1=Essential for the advisor   2=Helpful for the advisor to do   3=Nice, but they don't have to   4=Would prefer not to do
5=Absolutely not an advisor's role

1. Attend all general meetings _____

2. Store all group paraphernalia during the   summer and between changeover of officers _____

3. Attend all executive committee meetings _____

4. Keep official file in his/her office _____

5. Attend all other organizational activities _____

6. Inform the group of infraction of its bylaws, codes and standing rules _____

7. Explain university policy when relevant to the discussion

8. Keep the group aware of its stated objectives when planning events _____

9. Help the president prepare the agenda before each meeting _____

10. Mediate interpersonal conflicts that arise _____

11. Serve as a parliamentarian of the group _____

12. Be responsible for planning a leadership skill workshop _____

13. Speak up during discussion _____

14. State perceptions of his/her role as advisor at the beginning of the year _____

15. Be quiet during general meetings unless called upon _____

16. Let the group work out its problems, including making mistakes _____

17. Assist organization by signing forms only

18. Insist on an evaluation of each activity _____

19. Attend advisor training offered by the University _____

20. Take the initiative in creating teamwork and cooperation among officers _____

21. Speak up during discussion when he/she has relevant information or feels the group is making a poor decision __

22. Let the group thrive or decline on its merits; do not interfere unless requested to do so _____

23. Take an active part in formulation of the creation of group goals _____

24. Represent the group in any conflicts with members of the University staff _____

25. Indicate ideas for discussion when he/she believes they will help the group _____

26. Be familiar with University facilities, services, and procedures for group activities _____

27. Be one of the group except for voting and holding office

28. Recommend programs and speakers _____

29. 15. Request to see the treasurers books at the end of each semester _____

30. Take an active part in the orderly   transition of responsibilities between old and new officers _____

31. Check the secretaries minutes before they are distributed _____

32. Cancel any activity when he/she believes it has been inadequately planned _____

33. Receive copies of official correspondence _____

Adapted from Ball State University Downloads for Student Organizations and Advisors

Roles of an Advisor

Sample Meeting Agenda

I.   Call to order
The chairperson says, "The meeting will please come to order."

II.   Roll Call
Members say "present" as their name is called by the secretary.

III.   Minutes
The secretary reads a record of the last meeting.

IV.   Officers' Reports
Officers give a report to the group when called on, usually limited to a time if necessary.

V.   Committee Reports
First come reports from "standing" committees or permanent committees, then "ad hoc" or special committees.

VI.   Special Reports
Important business previously designated for consideration at this meeting.

VII.   Old Business
Items left over from previous meetings.

VIII. New Business
Introduction of new topics.

IX.   Announcements
Informing the assembly of other subjects and events.

X.   Adjournment
The meeting ends by a vote or general consent.

Adapted from Advising Your Hall Governing Board, Kansas State University, Department of Housing and Dining, 2003

Mechanic	Knows how to fix and fine tune
Psychic	Can read people's minds
Gambler	Willing to take risks
Musician	Keeps things in harmony
Analyst	Figures out all the angles
Diplomat	Knows what to say when
Disciplinarian	Confronts the people
Caretaker	Always aware of feelings
Mediator	Has to sit in the middle
Actor/Actress	Plays all the parts well
Counselor	Has a listening ear
Architect	Makes the plans and foundation
Soldier	Knows what battles to fight
Administrator	Takes care of the paperwork
Gopher	When no one else will do it
Quality Control	Makes sure performance is up to par
Friend	There for support
Devil's Advocate	Looks at all sides
Teacher	Leads by example
Author	Who else write all those memos?!
Juggler	Handles more than one thing at a time
Motivator	Gotta keep them going
Navigator	Can get people from one point to another
Gardener	Helps others grow
Lawyers	Knows the liabilities
Auditor	Knows financial status

From Schreiber, V. and Pfleghaar, E. "Supervising vs. Advising", UMR-ACUHO, 1999

Advisor's Agreement Worksheet

This worksheet can be a means of communicating expectations of the organization-advisor relationship. Both the advisor and officers of your organization should review each item. Organization members check off what you expect from the advisor in the "Org" column. Organization advisor(s) should check off those items he/she feels are appropriate for him/her to fulfill in the "Adv" column. From this, both parties can come to agreement.

The Advisor agrees to	Org	Adv	Agree
Attend all general meetings of the organization			
Attend all officer meetings			
Call meetings of the officers when deemed necessary			
Explain University policies where appropriate			
Explain University policy to the membership once a year			
Help the president prepare the agenda before each meeting			
Serve as parliamentarian to the group			
Speak up during discussion when you feel the group is about to make a poor decision			
Be quiet during general meetings unless called upon			
Provide resources and ideas to the group			
Take an active part in formulating goals for the group			
Act as a member of the group, except in voting and holding office			
Receive a copy of all correspondence			
Request the treasurer's books at the end of each semester			
Keep the official files in her/his office			
Let the group work out its problems, including making mistakes			
Request a written evaluation at the end of each semester			
Cancel any activities that you believe have been inadequately planned			
Approve all candidates for office in terms of scholastic standing; periodically check their GPAs			
Take an active part in officer transition and training			
Represent the group in any conflict with members of the University staff			
Mediate conflicts as they arise			
Veto a decision when it violates a by-law or constitution			
Keep the group aware of its stated goals, purpose and objectives			

Consent to Admission and Treatment Example

(As laws vary by state, please consult with legal council before using this form)

In the event of injury to or illness of the participant, _____(name) born _____,
20___, Social Security No. ____-___-_____, I (we) hereby authorize _____(University or college), or representative thereof, to admit the above named individual to a facility for emergency medical treatment as may be deemed necessary to his or her health or welfare.

The undersigned hereby consents to whatever medical treatment is deemed necessary. The undersigned on his/her own behalf of the individual named above, their heirs, assigns and personal representatives, hereby releases Kansas State University, its Trustees, Officers, Faculty, and Employees from any and all claims arising out of the admission to such a facility or treatment administered by such facility.

Persons to contact in the event of an emergency are listed below.

_____   _____
Date   Participant (signature)

_____
Parent or Guardian
(if Participant is under 18 years of age)

_____
Name   Address   Telephone

_____
Name   Address   Telephone

Field Trip Release Form Example

(As laws vary by state, please consult with legal council before using this form)

For and in consideration of being allowed to participate in the _____(event) to
_____ (place) to take place on _____(date) and described in more detail on the attached document, I, in full recognition and appreciation of the dangers and hazards involved in such activity, do hereby agree to assume all risks and responsibilities surrounding my participation in this event, and further, do hereby release and hold harmless _____ (University / College), its Trustees, Officers, Directors, Faculty, Employees, and participants from and against any and all liabilities to the undersigned, his/her dependants, assigns, personnel representatives, heirs, and next of kin for any and all damages, expenses (including attorney fees), claims, judgments, actions or causes of action as a result of any loss or injury to the person or property, which _____(name) may sustain or suffer during or arising out of activities of the above described event and during transportation to and from such event whether caused on its behalf or otherwise.

I understand that _____ (University / College) does not, in any manner, serve as principal, agent, or partner of any travel agent, commercial carrier or lodging establishment that may provide services or accommodations to the participant. I have read and understood this release and voluntarily sign this document and participate in this trip.

_____   _____
Date   Participant (signature)
I have read and understand this release and voluntarily allow my son/daughter to participate in this event

_____   _____
Date   Parent or Guardian
                                                       (if Participant is under 18 years of age)

Student Release and Waiver Agreement Example

(As laws vary by state, please consult with legal council before using this form)

In consideration of the agreement by _____ (University / College) to permit my participation in _____ (Name of activity), I, _____(Print Name), agree to abide by all rules and regulations established by _____ (University / College), all of which have been made known to me, or are available to me upon request.

Further, for myself, my heirs, assigns, executors and administrators, jointly or severally (all of whom are herby included as "I"), I agree not to sue, and further WAIVE, RELEASE AND DISCHARGE any and all rights, causes of action and claims which I, or any of us, might otherwise have against _____ (University / College), its agents, affiliates, employees, faculty, supervisors, administrators, representatives, officers, directors, instructors, volunteers, event leaders and coordinators and assistants, and any others associated with _____ (University / College), for any and all damage, injury or infirmity to my person or property, which may result from or arise out of my participation in any way in this _____ (University / College) activity.

I expressly assume full responsibility for and risk of any such injury or damage.

Without in any way limiting the foregoing, I also agree that this Agreement specifically includes my Release, Waiver, and Discharge of all aforesaid rights based upon an allegation of negligence on the part of _____ (University / College) and any of the foregoing groups or individuals.

Further, I also agree to indemnify and hold harmless _____ (University / College) and all of the foregoing groups and individuals from any and all actions, claims, demands, liability, loss, expenses, costs and professional fees arising from or associated with the response to or defense of anyone's making any such claim.

This Agreement specifically embraces each and every _____ (University / College) event during the entire season to which this registration applies, including every event or activity with the same effect as if executed after each and every activity or event in which I participate.

I HAVE READ, UNDERSTOOD TO MY SATISFACTION, AND VOLUNTARILY SIGNED THIS AGREEMENT. FURTHER, I AGREE THAT NO ORAL REPRESENTATIONS, OR STATEMENTS, OR INDUCEMENTS, APART FROM THIS AGREEMENT HAVE BEEN MADE, AND THAT THIS AGREEMENT CAN ONLY BE ALTERED IN WRITING AND MUTUALLY CONSENTED TO BY ME AND _____ (University / College).

Any reference to either the masculine or feminine gender indicates the other, as well. I expressly agree that this Agreement is intended to be construed as broadly and inclusively as is permitted by the law of any state or province in which any event or activity is conducted. Further, if any portion of this Agreement is held invalid, I agree that the balance shall, nevertheless, continue in full legal force and effect.

MEDIA RELEASE

In further consideration of your acceptance of my participation, and by signing this form I understand and agree that I may be providing services in the form of talent, visually, orally or both, which may be used as a part of a commercial production by one or more media agencies. I hereby grant permission to have my likeness and/or voice utilized by videotape or audiotape or quotation or any other form for use by any of the media. Further, I do fully indemnify _____ (University / College) and all media organizations, who are additional third-party beneficiaries of this Agreement, from any and all present or future claims directly related in any fashion to the presentation in any media form of my voice and/or likeness.

Signature: _____   Date: _____

Additional Resources

Advising Student Groups and Organizations by Dunkel and Shuh

Astin, A.W. (1984). Student involvement: A developmental theory for higher education. *Journal of College Student Personnel,* 25, 297-308.

Hovland, M., Anderson, E., McGuire, W., Crockett, D., Kaufman, J., and Woodward, D. (1997) *Academic Advising for Student Success and Retention.* Iowa City, IO: Noel-Levitz, Inc.

Floerchinger, D. (1992) Enhancing the role of student organization advisors in building a positive campus community. *Campus Activities Programming,* 26(6), 39-46.

Johnson, D.W. and Johnson, F.P.(1991). *Joining Together Group Theory and Group Skills.* Needham Heights, MA: Allyn and Bacon.
Lorenz, N. and Shipton, W. (1984). A Practical Approach to Group Advising and Problem Solving. A Handbook for Student Group Advisors. Schuh, J.H. (Ed.). American College Personnel Association.

Greenwell, GNA. (2002). Learning the rules of the road: A beginning advisor's journey. Campus Activities Programming, 35 (2), 56-61.

Vest, M.V. (2002). Years of experience are not enough: Seasoned advisors must continually adapt. Campus Activities Programming, 35(2), 62-66.

Dunkel, N.W. and Schuh, J.H. (1997). Advising student groups and organizations. San Francisco, CA: Jossey-Bass.

Online Resources

Student Organization Advising Resources Online

http://ul.studentaffairs.duke.edu/soar/index.html
http://www.wileyeurope.com/WileyCDA/WileyTitle/productCd-0787910333.html
http://www.isu.edu/stdorg/lead/manual/advisor.html
http://www.bgsu.edu/offices/sa/getinvolved/advising.pdf

Icebreakers and Teambuilders Online

http://www.mindtools.com/
http://www.byu.edu/tma/arts-ed/home/games.htm
http://www.ag.ohio-state.edu/~bdg/
http://www.residentassistant.com/games/teambuilders.htm
http://www.residentassistant.com/games/namegames.htm
http://www.residentassistant.com/games/icebreakers.htm
http://adulted.about.com/od/icebreakers/