Advisor

Manual



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***ADVISOR: One who advises another, especially o***

***or professionally: c counselor, mentor.***

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| ***fficially***  ***onsultant,*** | |  |
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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; re- searched online manuals and other resources; and compiled and edited reams of information. The result of these efforts is this handbook. While writ- ten 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 pro- fessionals 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 appre- ciate your feedback!

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

**BENEFITS OF ADVISING:**

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 inter-

ests.

∗ 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 organiza-

tion 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 de- gree 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 aca- demic 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 stu-

dents 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 stu- dents 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 organi-

zation’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 exam- ples 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 ex- periences 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 organiza-

tion.

**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*

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| 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 or- ganization (financial, scholarship, program- ming, etc.) Some advisors have a high level of involvement with every aspect of the organiza-  tion, others have a very limited role. It is up to the organization and the advisor to set the pa- rameters of involvement.  With those thoughts in mind, the following list  is a guideline to the “dos” of student organiza- tion advising: |  | • Be visible and choose to attend group meetings and events. At the  same time, know your limits. Establish an attendance schedule at organiza-  tion meetings, which is mutually agreed upon by the advisor and the student organization.  • Know your group's limits. Help students find a balance between activi-  ties 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 organiza- tion 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 treas-  urer 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. |
| • Assist officers with procedural matters. Be knowledgeable of the organization’s purpose and constitution and help the gen- eral 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 pur-  pose of the group and help them to build upon it. Help members  look toward the future by developing long-term goals and com- municating those plans to future members.  • Help to resolve intragroup conflict.  • Enjoy the impact you can have on the students’ develop-  ment. Help to develop the leadership potential within the group. | |
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Once again, this list is not meant to be totally inclusive or appli- cable 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 organi- zation. It is important to realize that your first responsibility is to the health and well being of the students and to uphold cam- pus and community policies and regulations. It may be neces- sary 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 Stu- dent 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

**Responsibilities of the Student**

**Organization to the Advisor**

• 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 organiza-

tion.

• Be laissez-faire or autocratic.

• Assume the group handles everything okay and doesn’t

need you.

• Assume the organization’s attitudes, needs and person-

alities will remain the same year to year.

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

**Questions You May Want to Ask the Organization**

The responsibilities of Student Organizations to their advisor in- clude, 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 meet-

ings, 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 pol-

icy changes are made.

• Allowing the advisor to share their thoughts and ideas.

• Showing respect and value for the advisor whom the organi-

zation 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 opera-

tional and special event/activity needs.

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

• How much involvement is expected or needed?

• How often does the group meet?

• How many major activities does the group plan per se-

mester?

• 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 organiza-

tion 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*

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|  | **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. *Information provided by Jim Mohr, Advisor for*  The advisor is overwhelmed by their responsibility. *Student Organizations and Greek Life, Eastern*  The advisor assumes a leadership function. *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 sup- ports 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 stu- dents/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 circum- stances 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 uni- versity's representative re- garding the organization's activities. As such, you are expected to give reasonable and sound advice to your or- ganization 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 organi- zation 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 proc- ess by being paranoid about

it. Just as there is no specific statement that explains fac-

ulty liability for every possible

classroom incident, there is

none that covers all the possi- ble situations student organi- zations might encounter. If

you have concerns about a situation unique to your or- ganization or to a specific event sponsored by the or- ganization you advise, please contact someone from the university staff who is knowl- edgeable 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 pro- vide a safer environment for program participants. Here are a few things that your or- ganization can do to identify and reduce risk:

♦ Complete a Pre-Event Planning Form to clarify the needs and expecta-

tions of participants.

♦ Identify specific risks in-

volved in the event.

These could include physical risks (such as an event with physical activ- ity) and liability risks (such as events involving alco- hol, minors, or travel).

♦ Identify options for reduc-

ing 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 pre-

paring for it in order to reduce likelihood of it oc- curring

⇒ Utilizing waivers that

outline the specific nature

and risk associated with

the event.

⇒ Canceling the event if

the conditions are danger-

ous 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 every-

one involved (officers,

members, advisors, par- ticipants, facilities staff,

*Information taken from Ball*

*State University Downloads*

*for Student Organizations and Advisors* and *Adapted from University of Wisconsin-*

*Stevens Point Student Or-*

*ganization 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 pe- riod 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*

**MORE ABOUT BUDGETS**

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| **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 bal-  ance from previous year, cash on hand, funds  in bank, interest, etc.)  ♦ Estimate expected income and when it is ex-  pected to be available (dues, sales, etc.)  ♦ Get price quotations on big expenditures, dele-  gate 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 plan-  ning.  ♦ 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- |
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| ***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? W  didn’t? Why? How can you improve?  ♦ Check into local and state regulations. Check University policy. | |

FUNDRAISING

♦ Involve all segments of your group, not just the officers.

People contribute to what they create. Get as many volun-

teers for your project as possible. Make sure they under- stand the cause and are willing to contribute their time and effort.

Many student organizations have big plans and excel- lent ideas for programs or services. However, few organizations have the fi- nances to make these plans real. It is important for stu- dent organizations to have some kind of fund raising plans and to execute those fundraisers with the utmost professionalism, account- ability, 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 possi- ble. 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 organiza- tion will not get excited or interested in your fund rais- ing 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.

♦ Determine your market: college students, community, par- ents, etc.

♦ Know your overhead.

♦ Advertise wisely.

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

♦ Recognize everyone involved in the planning and imple- mentation 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 tan- gible reminder of how they contributed to a good cause. Create and maintain good will with these contributors, be- cause 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

***Corporate Sponsorship***

One of the best ways to increase fund raising efforts is to ob- tain corporate sponsorship for an event, either through under- writing 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 eve- ryone. 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 adver- tising 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 some- times they are overused and get approached a great deal. Be creative.

♦ Fast food companies (ice cream, frozen yogurt, hamburg-

ers, 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.

*Adapted from Ball State University Downloads for Student*

*Organizations and Advisors*

***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 · Spaghetti dinner

· Recycling drive · Candy sale

· Rummage sale · Drive-in movie

· Marathons · Decathlons

· Pig Roast · Best beard contest

· Road rally · Car washes

· Talent show · Invitational turtle races

· Handmade boat contest · Kite flying contest

· Paper airplane 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 Week- end

· Pie auction. Bid for privilege of throwing a pie into another per- son’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 organiza- tion’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 ex- cellent source of income at sporting events or anywhere there is a place to hang a poster during an event.

**Program Planning Checklist**

**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 perspec- tives, 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 program- ming?**

Did you assume that only men in your community will be inter- ested 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 fast- ing due to religious commitments and beliefs?

In the month of December, will you have a Christmas party (while not acknowledging the other religious celebrations dur- ing 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 think-*

*ing, especially around the beliefs of other people.*

**Have you considered diverse racial and/or eth- nic 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.*

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, trans- portation 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 adver- tising need to go out? Who will be in charge of coordinat- ing 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 back- grounds, rituals and traditions; diverse racial and/or eth- nic populations; needs of students with disabilities; eco-

nomic limitations faced by some residents; heterosexual

bias and diverse sexual orientations.

**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 partici- pants 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 ap- pearing 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

*Timeline adapted from KSU, EIU, and CSU Programming Timelines and Checklists and former presentations by P. Putman and arti- cle by Talley, R. G. (1978). Programmer’s Checklist for the Performing Arts. Program- ming Magazine*

♦ 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?)

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
| **Opportunities** | **Threats** |

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, mes- sage of the day on computers, emails, etc.

♦ Contact the campus & local newspapers for placement in their cal- endar of events.

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

♦ Write a note on class- room wipeboards / chalkboards.

♦ Contact campus or lo- cal radio and ask if they'd donate a PSA (public service an- nouncement).

♦ Purchase professionally created posters.

♦ Chalk sidewalks in prominent locations around campus.

♦ Create an phone distri- bution list of all on- campus phone num-

bers. 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 give- aways.

♦ Go to a department head or faculty / staff meeting, or directly con- tact 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 permis- sion first), or in an aca- demic building lobby area.

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

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

♦ Order food from Food Services as an entice- ment 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 cam- pus 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 dis- play with posters around campus.

♦ Go to other organiza- tional meetings to an- nounce your event. Make sure student Senators know about your event & publicize it

to their constituents.

**COMMUNITY**

♦ Create flyers for posting

in the community. Gro-

cery stores, churches, daycare centers, de- partment stores, bars, laundry mats, and other high-traffic establish- ments are good, de- pending on whom you are targeting.

**TIPS FOR EVERY- WHERE**

♦ Word of mouth is impor-

tant! Get people ex-

cited 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 web- page!).

♦ 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 free-

bies, 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 offi- cers to the next. As the sta- bility 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 demon- strate 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 set-

backs.

• Anything the new offi-

cers 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 re-

treat.

♦ 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 informa-

tion he or she doesn’t have.

The structure of a team ef- fort 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 pro- cedures.

**One-on-One Training, Advisor with Officers** While it is ideal to have the outgoing officer team assist in training the incoming offi- cers, often it is left up to the advisor to educate the in- coming officers. In that situation, there should be a joint meeting of the new officers, as described in section 4 of the above out-

line. After that meeting, the advisor should meet indi- vidually with each officer; examine the notebook of the previous officer (or cre- ate 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 or- ganization. What are the expectations of each posi-

tion? 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*

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**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 con-

tracts. 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 imagina- tion! 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

**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.

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**Student Organization Officer Roles**

Each student organization writes its own con- stitution 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 respon- sibilities. It is intended to assist you in consti- tutional 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 per- sonalize his/her office. Individual interest ar- eas and skills often dictate the amount of

time an officer spends on a particular respon- sibility. 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 organiza- tion 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 ef- forts

Represents organization at official functions

Remains fair and impartial during organiza- tional decision making processes Coordinates organization elections

**Role of the Secretary**

*Some Potential Responsibilities:*

Keeps a record of all members of the organi- zation

Keeps a record of all activities of the organi- zation

Keeps and distributes minutes of each meet- ing 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 organiza- tion decision making process

Coordinates organization elections

**Role of the Treasurer**

*Some Potential Responsibilities*

Keeps all financial records of the organiza- tion

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 organiza- tion decision making processes

**Other possible positions:** Parliamentarian, Activities Director, Recruit- ment / Retention Director, Academic Coordi- nator, Liaisons, Community Service Director,

etc. 20

**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 ba- sics 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 mo- tions 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 chair- man:

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 mo- tion. 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*

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**Parliamentary Procedures at a Glance**

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

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| **TO DO THIS:** | **YOU SAY**  **THIS:** | **MAY YOU**  **INTERRUPT THE SPEAKER?** | **DO YOU**  **NEED A SECOND?** | **IS IT DEBAT-**  **ABLE?** | **CAN IT BE**  **AMENDED?** | **WHAT**  **VOTE IS NEEDED?** | **CAN IT BE RE-**  **CONSIDERED?** |
| 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.

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| 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 deci-  sion.” | YES | YES | YES | NO | MAJORITY | YES |
| Suspend Rules Tempo-  rarily | “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 Previ-  ously Tabled | “I move to take from the table…” | NO | YES | NO | NO | MAJORITY | NO |
| Reconsider a Hasty Ac-  tion | “I move to reconsider the vote  on…” | YES | YES | YES (**9**) | NO | MAJORITY | NO |

**NOTES:**

**(1) Unless moved when no question is pending. (8) Only if the main question has not been debated yet.**

**(2) Affirmative votes may not be reconsidered. (9) Unless the motion to be reconsidered is not debatable. (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 negative is needed to prevent consideration of main motion.**

**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 de- velop 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 comple- ment 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 effec-

tive 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 com-

mittees 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 Uni- versity 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 Un-

ion.

♦ Contract those new students who requested in-

formation about your organization by way of the

**RSO Preference Checklist.**

♦ Request lists or labels of target groups from Stu-

dent 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 en-

counter students searching for involvement -

Residence Halls, Career Services, Academic De- partments, 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.

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 Incorpora- tion Packet gives new members information about the or- ganization and current members information about the new members.

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**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 individual- ity.

**Organizational Flow Chart –**

Shows leadership positions. Helps people understand how the organization functions.

Analyze the needs of your members. Remember why peo-

ple get involved in the first place and then meet those needs.

*Adapted from Thundar Bolts, NDSU*

Retention Program—Tips and Suggestions

**Recruitment Tips**

♦ Remember that a personal contact is always better than 1000 flyers and newspapers advertise- ments. People join organizations because they like the people they find there. Nothing can re- place 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 informa-

tion about the HGB at each event.

♦ Ask key people to give recommendations of possible members and leaders. These recommenda-

tions 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 in-

troduce 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 oppor-

tunities, 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 mem-

bers 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*

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**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 them-

selves. 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 com- petencies, 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 refer- ences 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 prod- uct.

**Participation** Involvement in the organizational deci- sion making, planning and scheduling one's own

work and controlling one's own work activities.

**Enjoyment!** Having fun in a warm, friendly, suppor- tive atmosphere.

*Adapted from Thundar Bolts, NDSU* 27

Checklist to Personalize Your Manual

1. How to register a student organization / privi- leges

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 opportu- nities

14. Important dates

15. Offices / resources on campus

16. How to on: media services, dining services / catering; mail Services; printing requests; secu- rity requests; purchasing; room Reservations

17. Any special requirements your campus has of recognized groups

18. Phone list / contact info for important groups

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**Examples, Resources and Handouts**

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Example / Media Release

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|  | **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 contri- bution 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 ap- proaches.  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 orienta- tion 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* |

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|  | **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. Meetings: Stipulate the frequency of meetings, possibly the day of the week, and even the time and location.

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

3. Committees: 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. Financial: Provide for initiation fees, dues, and other assessments (if any); also details regarding delinquencies.

5. Elections: 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. Amendment of By-Laws: 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*

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| --- | --- | --- | --- | --- | --- |
|  | **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. | | | | |
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**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

3. Attend all executive committee meetings

5. Attend all other organizational activities

7. Explain university policy when relevant to the dis- cussion

9. Help the president prepare the agenda before each meeting

11. Serve as a parliamentarian of the group

13. Speak up during discussion

15. Be quiet during general meetings unless called upon

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

4. Keep official file in his/her office

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

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

10. Mediate interpersonal conflicts that arise

12. Be responsible for planning a leadership skill work- shop

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

16. Let the group work out its problems, including mak- ing mistakes

17. Assist organization by signing forms only 18. Insist on an evaluation of each activity

19. Attend advisor training offered by the University

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

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

25. Indicate ideas for discussion when he/she be- lieves they will help the group

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

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

20. Take the initiative in creating teamwork and coop- eration among officers

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

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

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

28. Recommend programs and speakers

30. Take an active part in the orderly transition of re- sponsibilities between old and new officers

31. Check the secretaries minutes before they are distributed

33. Receive copies of official correspondence

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

*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 neces-

sary.

**V. Committee Reports**

First come reports from “standing” commit- tees 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 con- sent.

*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 appropri- ate for him/her to fulfill in the “Adv” column. From this, both parties can come to agreement. | | | | |
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| --- | --- | --- | --- | --- | --- | --- |
| **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 of- fice |  |  |  |  |  |  |
| 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 Univer- sity 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 col- lege), 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 docu- ment, 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 partici- pants 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 accommoda-

tions 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) 39

**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, em- ployees, faculty, supervisors, administrators, representatives, officers, directors, instructors, volunteers, event leaders and co-

ordinators 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 Dis- charge 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 AGREE- MENT HAVE BEEN MADE, AND THAT THIS AGREEMENT CAN ONLY BE ALTERED IN WRITING AND MUTUALLY CON- SENTED 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, con- tinue 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 Ad- vising 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 com- munity. *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 Pro- gramming, 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.

**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.mindtools.com/) [**http://www.byu.edu/tma/arts-ed/home/games.htm**](http://www.byu.edu/tma/arts-ed/home/games.htm) [**http://www.ag.ohio-state.edu/~bdg/**](http://www.ag.ohio-state.edu/%7Ebdg/) [**http://www.residentassistant.com/games/teambuilders.htm**](http://www.residentassistant.com/games/teambuilders.htm) [**http://www.residentassistant.com/games/namegames.htm**](http://www.residentassistant.com/games/namegames.htm) [**http://www.residentassistant.com/games/icebreakers.htm**](http://www.residentassistant.com/games/icebreakers.htm) [**http://adulted.about.com/od/icebreakers/**](http://adulted.about.com/od/icebreakers/)

Online

Resources