Advisor Manual
for Advisors of Student Clubs and Organizations

Advisor: one who advises another, especially officially or professionally: consultant, counselor, mentor.

What’s Inside...?

| Benefits of Advising       | 2 |
| Advisor Roles             | 2 |
| Sample Advisor Contract   | 5 |
| Advising Dos              | 6 |
| Advising Don’ts           | 7 |
| Responsibilities of the Org. to the Advisor | 7 |
| Troubleshooting           | 8 |
| Advising Styles           | 8 |
| The Role of the Advisor Checklist | 9 |
| Advisor’s Agreement Worksheet | 10 |
| Roles of an Advisor       | 11 |
| Sample Meeting Agenda     | 11 |
| Officer Roles             | 12 |
| Officer Transition        | 13 |
| Constitution Guideline    | 14 |
| Hazing Policy             | 16 |
| Retreats                  | 18 |
| Membership & Recruitment  | 20 |
| Motivation                | 22 |
| Organizational Productivity Tips | 23 |
| Liability and Risk Reduction | 24 |
| FAU Waiver                | 26 |
| Budgeting                 | 27 |
| Fundraising & Corporate Sponsorship | 28 |
| Commercial Solicitation Policy | 29 |
| Event Planning Timeline   | 31 |
| Entertainment Services & Contracts | 33 |
| Publicizing Your Event    | 34 |
| Event Report              | 35 |
| Advisor Self-Evaluation Checklist | 36 |
| Advisor/Student Evaluation | 37 |
| Important Contacts        | 38 |
| Additional Resources      | 39 |
ADVISOR ROLES

Each advisor perceives his/her relation to a student organization differently. Some Advisors play very active roles, attending meetings, working with student officers, and assisting in program planning and development. Others maintain a more distant relationship to the organization. It is hoped that each Advisor will maintain some regular contact with his/her organization. An Advisor accepts responsibility for keeping informed about activities of the organization and for advising officers of the organization on the appropriateness and general merits of policies and activities. Advisors should be both accessible and interested and should provide whatever counsel a group or its members might seek.

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

As an advisor you will assume numerous roles. 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.

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
- Developing a personal relationship with students
- Furthering personal goals or interests by choosing to work with an organization that reflects one’s interests
- Sharing one’s knowledge with others
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 knowledge of their academic program and profession, a genuine interest in the personal and professional development of new professionals, and a willingness to connect students to a network of professionals. You may be approached to review resumes, to connect students with community resources, or to be a sounding board for their ideas of what they want to accomplish in the field.

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

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

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

CONFLICT MEDIATOR:
Inevitably, students are going to join the organization with different agendas, goals, and ideas about how things should function and the direction they should be taking. When working with students who have come in to conflict, it may be necessary to meet with them and have them discuss their issues with each other. In many cases, it may be necessary to remind them that they both want what is in the best interest of the organization. Ask them how they think they can work together, point out the organization’s mission, and ask how their conduct is helping the group achieve its mission.
Sometimes, one student may be causing problems with other students. In many cases this student may not realize that his/her actions are causing a problem. In this case, speaking with the student individually could be helpful. Chances are that no one has met with the student previously and discussed how his/her attitudes are impacting other people and how those attitudes or actions can be changed to make everyone feel better. In many cases, the student will appreciate honest feedback.

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

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

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

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

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

### Sample Advisor Contract

The members of *(organization)* request *(advisor name)* to serve as Advisor of the organization for a period not to exceed *(period of time)* beginning with *(semester)*.

Duties, responsibilities, and expectations of the position are as follows:

- List responsibilities and expectations
- of the Advisor and organization here

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 Signature: ____________________________ Date: _______________

I have met with the president of the above-named organization and discussed the 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’s Signature: _____________________________ Date: ________________

This contract is effective for *(period of time)* 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

---

**FLORIDA ATLANTIC UNIVERSITY**  
Student Involvement and Leadership
ADVISING DOs

Each advisor and organization leadership should openly discuss what kind of role the advisor should play with the organization. Some advisors have a high level of involvement with every aspect of the organization; others have a very limited role. It is up to the organization and the advisor to set the parameters of involvement.

With those thoughts in mind, the following list is a guideline to the “do’s” of student organization advising:

<table>
<thead>
<tr>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Assist officers with procedural matters. Be knowledgeable of the organization’s purpose and constitution and help the general membership adhere to them.</td>
</tr>
<tr>
<td>• Be knowledgeable about, and comply with federal, state and local laws and ordinances, as well as campus policies. Inform the group of pertinent policies.</td>
</tr>
<tr>
<td>• Empower students to take action and to take satisfaction in seeing the student organization succeed.</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
<tr>
<td>• Represent the group and its interests in staff and faculty meetings. Reach out to other advisors or departments (i.e. Student Organizations) for assistance.</td>
</tr>
<tr>
<td>• At the beginning, develop clear expectations about the role of the advisor and your relationship to the organization.</td>
</tr>
<tr>
<td>• Read the group’s constitution.</td>
</tr>
<tr>
<td>• 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).</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
<tr>
<td>• Discuss concerns with officers in private and praise them in public.</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
<tr>
<td>• Orient new officers and members to the history and purpose of the group and help them to build upon it. Help members look toward the future by developing long-term goals and communicating those plans to future members.</td>
</tr>
<tr>
<td>• Help to resolve intergroup conflict.</td>
</tr>
<tr>
<td>• Enjoy the impact you can have on the students’ development. Help to develop the leadership potential within the group.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Be visible and choose to attend group meetings and events. At the same time, know your limits. Establish an attendance schedule at organization meetings, which is mutually agreed upon by the advisor and the student organization.</td>
</tr>
<tr>
<td>• Know your group’s limits. Help students find a balance between activities and their academic responsibilities.</td>
</tr>
<tr>
<td>• Keep your sense of humor and enthusiasm. Share creative suggestions and provide feedback for activities planned by students.</td>
</tr>
<tr>
<td>• Serve as a resource person. The advisor does not set the policy of the group, but should take an active part in its formulation through interaction with the members of the group. Since members and officers in any organization are ordinarily active only as long as they are students, the advisor can serve as a continuity factor for the group.</td>
</tr>
<tr>
<td>• Be consistent with your actions. Model good communication skills and listening skills. Develop good rapport.</td>
</tr>
<tr>
<td>• Be available in emergency situations.</td>
</tr>
<tr>
<td>• Head off situations that might give rise to poor public relations for the student group or University.</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
<tr>
<td>• Carefully review monthly financial reports from the organization treasurer or business manager. Familiarize yourself with the group’s financial structure, from where the treasury is derived (dues, fundraising), for what the money is used, how money is allocated, and how the money is budgeted; assist in budget development and execution.</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
<tr>
<td>• Encourage feedback and the evaluation process.</td>
</tr>
<tr>
<td>• Plan and encourage attendance at leadership training.</td>
</tr>
<tr>
<td>• Do things right and to do the right things. Guide and assist students in becoming responsible leaders.</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
</tbody>
</table>

Once again, this list is not meant to be totally inclusive or applicable to every organization, but it may serve as a guideline when determining the role that you will play. It is also important to bear in mind that the job of Advisor is not always an easy one. At times you may have to make a difficult decision or take an action which is not popular with the organization. It is important to realize that your first responsibility is to the health and well-being of the students and to uphold campus and community policies and regulations. It may be necessary on occasion to use your authority to ensure that you meet these responsibilities.

Some information provided by Jim Mohn, Advisor for Student Organizations and Greek Life, Eastern Washington University; Office of Student Leadership Development Programs at East Carolina University; and Jim Kapell, Associate Director of Campus Activities, Denison University; and adapted from the Wesley College Student Organizational Manual and Boland, Paul A., Student group advising in higher education, ACA/Personnel Series No. 8, Scherber, Y. and Pfleghar, E. “Supervising vs. Advising”, UMR-ACCIO, 1999; and Adapted from Leaders Bto, University of Kansas.
Responsibilities of the Student Organization to the Advisor

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

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

Questions You May Want to Ask the Organization

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

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

Office of Student Leadership Development Programs at East Carolina University

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

**ADVISING STYLES**

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

- **Directing:** The advisor provides specific instructions and closely supervises task accomplishments. Use this style with students/groups that are at a low level of readiness.
- **Coaching:** The advisor continues to direct and closely supervise task accomplishment, but also explains decisions, solicits suggestions, and supports progress. Use this style with groups that have a few leaders that are at a higher readiness level who will need your support with the rest of the group to get things accomplished.
- **Supporting:** The advisor facilitates and supports the efforts toward task accomplishments and shares responsibilities for decision making with the students. Use this style with 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.
- **Delegating:** The advisor empowers the students to conduct their own decision making, problem solving, and delegating. Use this style with students/groups that are at a high level of readiness.

**ADVISING SKILLS**

- **Flexibility:** You must be able to move from one style to another in order to meet the needs of the different types of students and multiple circumstances you will encounter.
- **Diagnosis:** You have to learn how to diagnose the needs of the students you advise. Determining what is needed as opposed to what is wanted is sometimes a difficult task. It is also important to note that what is needed is not always the thing that will get the most positive response - it is what will lead the student through a problem, set the standard for the future, or help to teach the student a valuable life lesson.
- **Contracting:** You have to learn how to come to some agreements with students. It can be helpful to work together to reach an agreement as to which advising style they seek from you. This is a valuable lesson for assisting students with understanding the rules of engagement and interaction that will be carried forth as they mature.

---

**TROUBLESHOOTING**

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 policies and procedures.

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

---

Information provided by Jon Kapell, Drexel University

---

Information provided by Jim Mohr, Eastern Washington University

---

Information provided by Jon Kapell, Drexel University
THE ROLE OF THE 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, and then meet to compare answers and discuss any differences. For any items, which are determined not to be the responsibility of the advisor, it would be valuable to clarify which officer will assume that responsibility.

For each statement, respond according to the following scale:

1 = Essential for the advisor  
2 = Helpful for the advisor to do  
3 = Nice, but they don’t have to  
4 = Would prefer not to do  
5 = Absolutely not an advisor’s role

1. Attend all general meetings ______
2. Store all group paraphernalia during the summer and between changeovers of officers’ ______
3. Attend all executive committee meetings ______
4. Keep official file in his/her office ______
5. Attend all other organizational activities ______
6. Inform the group of infraction of its bylaws, codes and standing rules ______
7. Explain university policy when relevant to the discussion ______
8. Keep the group aware of its stated objectives when planning events ______
9. Help the president prepare the agenda before each meeting ______
10. Mediate interpersonal conflicts that arise ______
11. Serve as a parliamentarian of the group ______
12. Be responsible for planning a leadership skill workshop ______
13. Speak up during discussion ______
14. State perceptions of his/her role as advisor at the beginning of the year ______
15. Be quiet during general meetings unless called upon ______
16. Let the group work out its problems, including making mistakes ______
17. Assist organization by signing forms only ______
18. Insist on an evaluation of each activity ______
19. Attend advisor training offered by the University ______
20. Take the initiative in creating teamwork and cooperation among officers ______
21. Speak up during discussion when he/she has relevant information or feels the group is making a poor decision ______
22. Let the group thrive or decline on its merits; do not interfere unless requested to do so ______
23. Take an active part in formulation of the creation of group goals ______
24. Represent the group in any conflicts with members of the University staff ______
25. Indicate ideas for discussion when he/she believes they will help the group ______
26. Be familiar with University facilities, services, and procedures for group activities ______
27. Be one of the groups except for voting and holding office ______
28. Recommend programs and speakers ______
29. Request to see the treasurer’s books at the end of each semester ______
30. Take an active part in the orderly transition of responsibilities between old and new officers ______
31. Check the secretaries’ minutes before they are distributed ______
32. Cancel any activity when he/she believes it has been inadequately planned ______
33. Receive copies of official correspondence ______

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

### ADVISOR'S AGREEMENT WORKSHEET

The Advisor agrees to:

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

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

*From Schreiber, V. and Pfleghaar, E. “Supervising vs. Advising”, UMR-ACUHO, 1999*

### Sample Meeting Agenda

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

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

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

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

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

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

VII. Old Business
Items left over from previous meetings.

VIII. New Business
Introduction of new topics.

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

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

*Adapted from Advising Your Hall Governing Board, Kansas State University, Department of Housing and Dining, 2003*
**Student Organization Officer Roles**

Each student organization writes its own constitution and bylaws, which should outline the basic role of each organization officer. It is solely up to the members of the organization to assign responsibilities to a specific officer. This reviews some possible position responsibilities. It is intended to assist you in constitutional development and to help you answer the question, “Now I've been elected, what am I suppose to do?” Although a student organization's constitution lists some specific positions' responsibilities, each officer should have the freedom to personalize his/her office. Individual interest areas and skills often dictate the amount of time an officer spends on a particular responsibility. However, a good officer never forgets what the basic responsibilities are.

### Role of the President
*Some Potential Responsibilities:*

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

### Role of the Secretary
*Some Potential Responsibilities:*

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

### Role of the Vice President
*Some Potential Responsibilities:*

- Assume the duties of the President as needed
- Serve as an ex-officio member of standing committees
- Plans officer's orientation and organizational retreats
- Coordinates organizational recruitment efforts
- Represents organization at official functions
- Remains fair and impartial during organizational decision making processes
- Coordinates organization elections

### Role of the Treasurer
*Some Potential Responsibilities*

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

### Other Possible Positions:

Parliamentarian, Activities Director, Recruitment/Retention Director, Academic Coordinator, Liaisons, Community Service Director, Historian, etc.
One of the most important functions of an advisor is to assist in the transition from one set of organization officers to the next. As the stability of the organization, the advisor has seen changes, knows what works and can help maintain continuity. Investing time in a good officer transition early on will mean less time spent throughout the year nursing new officers through the quarter.

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

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

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

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

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

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

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

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

Information provided by Jim Mohr, Advisor for Student Organizations and Greek Life, Eastern Washington University
FAU STUDENT ORGANIZATIONS CONSTITUTION GUIDELINES

Article 1- Name of organization
The name of this organization shall be ________________. ________________ may also be referred to as acronym is applicable.

Article 2- * Purpose of the organization
The purpose of this organization shall be ________________ (define purpose in clear, concise terms).

Article 3- Membership of the organization
Section 1 – Members: Must be open to all FAU students.
Section 2 – Associate Members: Faculty, staff, and alumni may be associate members. Associate members cannot vote or hold office.
Name of organization shall not discriminate on the basis of *gender, race, color, sex, disability, age, sexual orientation, or political and religious affiliation in any of its policies, procedures or practices. * All groups except those exempt by law must have opportunities for male and female memberships. Sports clubs involving contact or competitive selection mat limit participation to one sex, but must permit membership in the club to both sexes.

Article 4- Regulations
This section must include a statement that the organization will abide by all FAU regulations and Federal and State laws.
This section must also include a statement that the organization agrees to abide by the Anti-hazing statement. See attached Hazing Policy.

Article 5- * Officers
Section 1 – The officers of this organization shall be President, Vice President, etc. (do not include names).
Section 2 – In order to be eligible for officer, candidate shall specify requirements. All officers must be registers FAU students who meet the University’s minimum qualifications for student officers, which is a 2.25 GPA and be registered for 6 credits hours for undergraduate students and 3 credit hours for graduate students (see pages 185-186 of the Student Handbook, Participation in Campus Activities by Students and Minimum Qualifications for Student Leaders). Officers have to be in good academic standing, which means, not on probation and cannot be freshmen.
Section 3 – The duties of officers are as follows (list the specific duties for each officer):
a. President
b. Vice President
c. Secretary
d. Treasurer
e. COSO representative
f. Etc.
* There must be a minimum of 2 qualified officers.
Article 6- Selection of Officers
Section 1 – Method of nomination procedure and election of officers.
Section 2 – Statement that addresses the issue of a tie.
Section 3 – The officers shall be elected when (what semester) and shall take office when (what semester). Officer selection must take place at least once per academic year.
Section 4 – Term of office (may not exceed one year).
Section 5 – Statement whether or not an officer can hold more than one position (if so explain).
Section 6 - Statement whether officers can be re-elected (if so explain).

Article 7- Officer Vacancies
Section 1 – Should a vacancy occur in any office, it shall be filled how (majority vote, appointment, and consensus).
Section 2 – Must include a statement regarding term of the replacement officer (generally the remainder of the current term).
Section 3 – Impeachment process

Article 8- Advisor*
Section 1 – Duties of the faculty advisor
Section 2 – Method of faculty advisor selection
*At least one advisor MUST be a full-time faculty or staff member at FAU.

Article 9- Meetings
Section 1 – Regular meetings shall be held when (on what day and how often)
Section 2 – Special meetings may be called by whom, why and how often (appointment, election).
Section 3 – A quorum for any regular or special meeting shall consist of a majority of the members (50% + 1).
Section 4 – Statement of what procedures will be used to conduct meetings (e.g. Robert’s Rules of Order).

Article 10- Amendments
The constitution may be amended how.

By-Laws- By-laws include details relating to committees, dues, parliamentary authority, disciplinary action, etc.
FAU Hazing Policy

According to the University Student Handbook under Section 6C5-7.007 Disruptive Conduct, Hazing is prohibited. Attention is called to Presidential Policy Memorandum 59 for guidelines defining actions by students or other persons associated with any University organization which actions are prohibited by Florida Statutes.

"Hazing" means any action or situation which recklessly or intentionally endangers the mental or physical health or safety of a student for the purpose of initiation or admission into or affiliation with any organization operating under the sanction of a postsecondary institution.

Such term includes, but is not limited to, any brutality of a physical nature, such as whipping, beating, branding, forced calisthenics, exposure to the elements, forced consumption of any food, liquor, drug, or other substance, or other forced physical activity which could adversely affect the physical health or safety of the student, and also includes any activity which would subject the student to extreme mental stress, such as sleep deprivation, forced exclusion from social contact, forced conduct which could result in extreme embarrassment, or other forced activity which could adversely affect the mental health or dignity of the student.

Penalties for hazing may include the imposition of fines; the withholding of diplomas or transcripts pending compliance with the rules or pending payment of fines; and the imposition of probation, suspension, dismissal, and any other sanctions the Office of Greek Affairs deems appropriate.

In the case of a university organization which authorizes hazing in blatant disregard of such rules, penalties may also include rescission of permission for that organization to operate on campus property or to otherwise operate under the sanction of the university.

Prohibited Activities: The following is a list of example activities classified as hazing and should not be allowed by any chapter. Actions and activities that are explicitly prohibited include, but are not limited to:

1. Calisthenics such as sit-ups or push-ups.

2. An undue delay between the conclusion of pre-initiation week and the actual initiation ceremony.

3. Total or partial nudity at any time.

4. Staging mock or local initiations prior to the initiation ceremony.

5. Wearing or carrying items for no purpose, such as coconuts, helmets, burlap bags, bricks, paddles, rocks, etc.

6. Pledges versus members in athletic contests or other competitions, except for balanced teams composed from both groups.

7. Dropping food (eggs, grapes, liver, etc.) in the mouths of pledges.

8. Requiring pledges to wear unusual, embarrassing or uncomfortable clothing.


10. Pledges expected to do anything that the active members will not volunteer to do with them.

11. Throwing whipping cream, water, paint, etc., on a pledge.

12. House duties not also shared by initiated brothers.
13. Extremely loud music or many repetitions of the same music played during pre-initiation week and/or between portions of the ritual.

14. Pledges expected to do anything exclusively "for the fun or entertainment of the members."

15. Pushing, shoving, or tackling pledges.

16. Pledges awakened repeatedly during the night.

17. Rat court, kangaroo court, or any individual interrogations.

18. Lengthy work sessions.

19. Forcing drugs or alcoholic beverages in any amount by threats or peer pressure on a pledge.

20. Yelling or screaming at pledges.

21. Line-ups of pledge class.

22. Deception prior to the ritual designed to convince a pledge that he will not be initiated or that he will be hurt.

23. Pledges not permitted adequate time for studies during pre-initiation or initiation periods.

24. Memorization of stories, poems, or information not directly related to your fraternity.

25. Less than six continuous hours of sleep for pledges each night during pre-initiation and initiation.

26. Required eating of offensive foods such as raw onions, spoiled foods, pet foods, etc.

27. Calling pledges "scums" or similar names.

28. Road trips, kidnapping of pledges or members.

29. Members intentionally littering or jumbling the house or a room for pledges to clean.

30. War games.

31. Assigning vandalism "pranks" such as stealing, painting objects, panty raids, harassing another organization.

32. Errands run by pledges for the actives members or any personal servitude.

33. Putting pledges in a room which is uncomfortable (temperature, noise, small) during pre-initiation activities or between portions of the ritual.

34. Feminine apparel of any kind.

35. Physical mutilation of the body via "branding" or tattooing - pledges or actives.
RETREATS

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

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

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

SELECTING A FACILITY
On Campus or Off Campus; convenience vs. isolation; Urban or Rural Getaway. When looking for an off campus retreat location consider nearby summer camps. They often charge cheap rates in the off season. Be sure to check availability, accessibility, and accommodations. Don't forget about costs and contracts. The Office of Student Involvement and Leadership have contact names and numbers for retreat locations. Consider the Ropes Course Challenge for a great on-campus experience!

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. If your retreat is on campus, remember the organization is required to use Chartwells for any food needs.

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 – 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.
MEMBERSHIP & RECRUITING

New members bring new ideas, increase the organization's person power, foster organizational growth, prevent member burnout, and take over leadership roles when you leave. People join organizations for many reasons. They want to get involved, meet people and make new friends; they want to develop skills and have fun. 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.

Know and Understand Your Organization

It is important that both the leadership and the membership know what the organization goals and objectives are.

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

Set Recruitment Goals

Now that you know the type of people you are interested in recruiting, the next step is to set some recruitment goals. How many new members can your organization reasonably assimilate into the group? Will you allow people to join at any time or only during a pre-designated recruitment period? Will you hold a mass meeting or is membership by invitation only?

- Keep your membership profile in mind. When designing your recruitment strategy, ask yourself what places do these prospective members most likely frequent? Do they have special interests? What kind of publicity would attract their attention?
- Remember what made you get involved. Probably the most important step in designing a recruitment strategy is for you to think back to when you first became involved. What attracted you? How were you recruited? If you weren’t, how did you hear about the group? Why have you stayed involved?

Get Everyone Involved

Have your current members identifying people they know who might want to get involved. Personally invite them to attend a meeting. Word-of-mouth is the best and least expensive type of publicity you can use.

- Talk about your group. Tell people what you have to offer them. Ask them about themselves – and really listen.
- Sell your organization and the benefits of membership. Tell them how the organization can benefit someone like them. Personalize the message to each potential member. Let them know how their talents, skills, and interests would help the organization.

Design an Advertising Campaign Using Visual Elements

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

Plan a Special Welcoming Meeting

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

Hold an Orientation for New Members

Developing and conducting an organizational recruitment campaign is very important. Yet, as we all know, retaining these new members is another matter entirely.

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

Adapted from Ball State University Downloads for Student Organizations and Advisors

FLORIDA ATLANTIC UNIVERSITY
Student Involvement and Leadership
RECRUITMENT TIPS

• Remember that a personal contact is always better than 1000 flyers and newspapers advertisements.
• People join organizations because they like the people they find there. Nothing can replace the simple act of getting to know someone and asking them to join the organization.
• Get scheduled to make a brief introduction of your organization at each floor meeting.
• Co-sponsor campus events so that your name gets out there more.
• Ask key people to give recommendations of possible members and 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, introducing 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.
• 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.
• Get exclusive rights to a really cool “members only” job for the organization.
• Hold meetings and events in comfortable, visible, easy-to-come-to places.
• Make a list of all of the advantages of being a member. This could include public speaking opportunities, or any number of other things. Use this list of advantages as your major selling points for new members.
• Always take photos at meetings and events, and then put together a scrapbook for prospective members to see.
• When working to recruit members, always try to think in terms of “what’s in it for them.”
• Rent a video camera and make your own recruitment video. It’s 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.
• 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!”
• 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 display information about your organization.
• Set up informational tables in the Breezeway.
• Reach out to staff & faculty who will encounter students looking for involvement.
• Set up a recruitment table at every event you sponsor.
• Ask each current member to bring a friend to your next meeting.
• Set up a Facebook page for your group.

From Dathe, T. and Tumbarello, T. “Advising 101” UMR-ACUHO, 1999 & Thundar Bolts, NDSU

RETENTION PROGRAM – Tips & Suggestions

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

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

Adapted from Thundar Bolts, NDSU

FLORIDA ATLANTIC UNIVERSITY
Student Involvement and Leadership
MOTIVATION

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

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

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

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

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

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

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

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

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

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

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

GRAPE Theory of Motivation
Growth Being able to increase one's skills and competencies, performing new or more complex tasks, participating in training programs.
Recognition Promotion within the organization, praise for achievements, positive and constructively critical feedback, receiving an award, printed references to an individual's activities, being "listened to."
Achievement The opportunity to solve a problem, to see the results of one's efforts, to reach goals that one has established to create a 'whole' tangible product.
Participation Involvement in the organizational decision making, planning and scheduling one's own work and controlling one's own work activities.
Enjoyment! Have fun in a warm, friendly, supportive atmosphere.

Adapted from Thundar Bolts, NDSU

Adapted from Ball State University Downloads for Student Organizations and Advisors
20 Tips for Advisors to Increase Organizational Productivity

1. Know what the students expect of you as an Advisor.
2. Let the group and individual members know what you expect of them.
3. Express a sincere interest in the group and its mission. Stress the importance of each individual’s contribution to the whole.
4. Assist the group in setting realistic, attainable goals. Ensure beginning success as much as possible, but allow the responsibility and implementation of events to lie primarily with the organization.
5. Have the goals or objectives of the group firmly in mind. Know the purposes of the group and know what things will need to be accomplished to meet the goals.
6. Assist the group in achieving its goals. Understand why people become involved. Learn strengths and emphasize them. Help the group learn through involvement by providing opportunities.
7. Know and understand the students with whom you are working. Different groups require different approaches.
8. Assist the group in determining the needs of the people the group is serving.
9. Express a sincere interest in each member. Encourage everyone to be responsible.
10. Assist the members in understanding the group’s dynamics and human interaction. Recognize that at times the process is more important than the content.
11. Realize the importance of the peer group and its effect on each member’s participation or lack thereof. Communicate that each individual’s efforts are needed and appreciated.
12. Assist the group in developing a system by which they can evaluate their progress. Balance task orientation with social needs of members.
13. Use a reward system and recognition system for work well done.
14. Develop a style that balances active and passive group membership.
15. Be aware of the various roles that you will have: clarifier, consultant, counselor, educator, facilitator, friend, information source, mentor, and role model.
16. Do not allow yourself to be placed in the position of chairperson.
17. Be aware of institutional power structure—both formal and informal. Discuss institutional developments and policies with members.
18. Provide continuity for the group from semester to semester (not mandatory but encouraged).
19. Challenge the group to grow and develop. Encourage independent thinking and decision-making.
20. Be creative and innovative. Keep a sense of humor!

(Adapted from M.J. Michael)
Office of Student Leadership Development Programs at East Carolina University

LIABILITY AND RISK REDUCTION

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

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

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

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

- Identify specific risks involved in the event (such as an event with physical activity) and liability risks (such as events involving alcohol, minors, or travel).
Identify options for reducing risks by including, but not limited to:
  o Hiring a third party vendor or contractor
  o Purchasing additional liability insurance
  o Preparing liability waivers, if necessary
  o Providing advanced training
  o Assuming a ‘worst-case scenario’ and preparing for it in order to reduce likelihood of it occurring
  o Utilizing waivers that outline the specific nature and risk associated with the event.
  o Cancelling the event if the conditions are dangerous or the group is not prepared to assume full responsibility for the risk involved

Assess the capability of the group to manage risk.

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

Develop a plan of action in reducing risk.

Communicate with everyone involved (officers, members, advisors, participants, facilities staff, etc).

Information taken from Ball State University Downloads for Student Organizations and Advisors and Adapted from University of Wisconsin-Stevens Point Student Organization Advisor Manual.
RELEASE OF LIABILITY, WAIVER OF CLAIMS, EXPRESS ASSUMPTION OF RISKS, AND HOLD HARMLESS AGREEMENT

In consideration of participating in the _____________________________ hosted by ________________ of Florida Atlantic University (the “Activity”), I hereby agree as follows:

I, _____________________________, for myself and my estate, heirs, administrators, executors, and assigns, hereby release and hold harmless the State of Florida, the Florida Atlantic University Board of Trustees, and their officers, directors, employees, representatives, agents, and volunteers (collectively, the “Releases”), from any and all liability and responsibility whatsoever, however caused, for any and all damages, claims, or causes of action that I, my estate, heirs, administrators, executors, or assigns may have for any loss, illness, personal injury, death, or property damage arising out of, connected with, or in any manner pertaining to the Activity, whether caused by the negligence of Releas es or otherwise.

I fully understand that there are potential risks and hazards associated with the Activity, including, but not limited to, possible injury or loss of life. I further understand that while participating in the Activity, I will be interacting with persons, places or objects that are not associated with or under the control or supervision of the Releases. Despite the potential risks and hazards associated with the Activity, I wish to proceed, and freely accept and assume all risks and hazards that may arise from my participation in the Activity and that could result in loss, illness, personal injury, death, or property damage, whether caused by the negligence of Rele as es or otherwise.

I further hereby agree to defend, indemnify and hold harmless the Releases from any judgment, settlement, loss, liability, damage, or costs, including court costs and attorney fees for both the trial and appellate levels, which Releases may incur as a proximate result of any act or omission on my part during my participation in the Activity.

In signing this agreement, I acknowledge and represent that I have read and understand it and that I sign it voluntarily and for full and adequate consideration, fully intending to be bound by the same.

I HAVE READ THIS AGREEMENT, UNDERSTAND THAT I AM GIVING UP SUBSTANTIAL RIGHTS BY SIGNING IT, AND VOLUNTARILY AGREE TO BE BOUND BY IT.

Dated this ____________ day of _______________, 200__.

__________________________________  ______________________________
Name of Participant     Parent/Guardian’s Signature
(I certify that I am 18 years of age or older)  (If Participant is under 18 years of age)
One task that groups face is the development of a plan to be fiscally responsible with funds. A budget can be a helpful method for keeping track of group funds.

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

**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 to future planning.

---

**DEVELOPING A BUDGET**

- Prepare an outline of the organization’s planned activities for the coming year.
- Do careful studies, investigations, and research of funding, costs, and resources.
- Estimate expected income and when it is expected to be available (dues, sales, etc.)
- Get price quotations on big expenditures, and delegate these responsibilities to members.
- Rank order by their relative importance, which activities and programs are the widest expenditures of funds.
- Choose programs to initiate; ask how much is available to allocate.
- Once approved, adapted, and prepared, it should be monitored closely.
- Formulate procedures and politics 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 costs and only allow approved expenditures.
- Assess budget regularly.

---

*Adapted from Leader Bits, The University of Kansas*
Many student organizations have big plans and excellent ideas for programs or services. However, few organizations have the finances to make these plans real. It is important for student organizations to have some kind of fund raising plans and to execute those fundraisers with the utmost professionalism, accountability, and legitimacy. Fundraising events can be a lot of fun for all involved. It is important to make the fundraising project a group effort and to get as many people involved as possible. Not only will you have more help to accomplish your goals, but you will also get more people interested in giving money. The key to being successful in fundraising is to be creative and to keep your goal in mind. Members of your organization will not get excited or interested in your fundraising 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.

### Guidelines for Student Organization Fundraising Activities

Student organizations may engage in fundraising activities on campus under certain circumstances. Any proceeds of these fundraising activities must be used for the activities and projects of the organization itself in furtherance of its goals and objectives. Any fundraising activities are subject to the following rules and regulations:

**General Rules and Regulations You must initial after each number.**

1. All student organizations wanting to fundraise must obtain approval from both their advisor and an administrator in the Student Involvement and Leadership Office. This approval process is accomplished through the completion of a Facility Request form, and must be completed two weeks prior to the date of the proposed fundraiser.

2. All sales conducted on campus shall conform to University policies and Florida, Palm Beach county ordinances and laws. For example, raffles are prohibited by state law, and date/service auctions are limited by university policy.

3. There shall be no sales that are in conflict with or which violate a University contract with existing campus agencies. No A and S fees may be spent on the fundraising event. All student organizations wanting to hold a fundraiser that requires an initial financial expenditure must have sufficient non-organizational funds to cover these expenses. Student organizations cannot use A&S fees to fundraise for the benefit of their organization.

4. Monies raised and/or collected must be deposited into the appropriate student organization on campus account within 48 hours of the completion of the event.

5. No sales will be allowed for the financial gain of individual(s) outside of the common interests of the club/organization; with the exception of the student organizations that have 501c3 status.

6. The registered student organization must have a collection box or bank bag with a lock on site to store the collected fund.

7. At the location of the fundraiser, the registered student organization must post in a visible location the fundraising disclaimer (see below).

8. It shall be the responsibility of the organization to monitor, clean up, and remove all materials at the site of the fundraiser when concluded.

9. Violations of the rules, regulations, procedures, and any other University policies while conducting the fundraiser may result in a loss of such privileges or other measures deemed appropriate.
Charitable Organization Fundraisers: Rules and Regulations

1. A student organization may conduct a fundraising event for a charitable organization only when the Facility Request form has been submitted and received with all approval signatures. ________

2. The charitable organization must hold a 501.c3 status. ________

3. At the location of the fundraiser, the registered student organization must have a representative of the charitable organization present and/or pamphlets and literature available about the charitable organization. ________

4. The registered student organization must use a 2-part receipt book when collecting funds (a 2-part receipt book will be provided by the Student Involvement and Leadership to each organization that is approved to conduct a fundraiser for a charitable organization). A receipt is written and a copy is given to the donor and a copy is kept by the student organization and kept on file by the treasurer of the organization for a minimum of four (4) years for auditing purposes. ________

5. Within 30 days of the end of the fundraiser, verification of receipt of donation must be made to Student Involvement and Leadership. Verification may include one of the following:
   A. A copy of the check or money order made out to the charitable organization, or
   B. A letter from the charitable organization thanking the student organization for the donation. ________

Disclaimer: This organization does not represent Florida Atlantic University, its interests, or its opinions. Florida Atlantic University has provided no financial assistance for this endeavor nor will Florida Atlantic University receive any funds for this endeavor. Monies donated are collected and distributed solely at the discretion of the fund raising organization to the charitable organization for which this fundraiser is intended. Florida Atlantic University is not responsible for receiving or distribution of funds. This event is not representative of support of the charitable organization by Florida Atlantic University.

Please fill out the following information:

Name of student organization ______________________________

Date of fundraiser __________________________

Time of fundraiser __________________________

Location of fundraiser ______________________________

Account number for funds to be deposited into _____________________________

Who is the fundraiser benefiting (student organization, name of 501.c3)? _________________________

Please explain the fundraiser in detail

__________________________________________________________________________________

__________________________________________________________________________________

__________________________________________________________________________________

__________________________________________________________________________________

I have read and understood the “Guidelines for Student Organization Fundraising Activities.” I agree to abide by all the rules and regulations in the “Guidelines for Student Organization Fundraising Activities.”

__________________________     ______________________________
Signature       Date submitted
Planning Your Fundraiser

- Set a goal.
- Ask for suggestions from your members. What do the members want to do? Brainstorm for ideas.
- Find out what has been done before. What worked? What didn’t? Why? How can you improve?
- Check into local and state regulations. Check University policy & the Club Manual for more specific information.
- Involve all segments of your group, not just the officers. People contribute to what they create. Get as many volunteers for your project as possible. Make sure they understand the cause and are willing to contribute their time and effort.
- Determine your market: college students, community, parents, etc.
- Advertise wisely.
- Let everyone know your expectations in advance and update on progress. Using a goal poster is a great idea; make sure that the poster is displayed prominently.
- Recognize everyone involved in the planning and implementation of the fundraising project. Reward those who achieve. Make certificates, ribbons, or other type of small rewards for everyone who volunteered for the project.
- Thank supporters. Give your big donors some kind of tangible reminder of how they contributed to a good cause. Create and maintain good will with these contributors because they will tend to help again in the future.
- Complete a written evaluation of report. Make sure you include: contact names, addresses, and phone numbers; time lines and important dates; suggestions of things to do differently.

A few fundraising ideas...

The following are ideas for creative fundraising projects. This list just touches the surface of the many projects available to raise money. Be creative and brainstorm for other ideas!

- Rummage sale
- Marathons/Decathlons
- Road Rally
- Kite flying contest
- Talent show
- Paper airplane contest
- Candy sale
- Film festival
- Drive-in movie
- Best beard contest
- Car wash
- Pool tournament
- Plant sale
- Craft sale
- Pet wash
- T-shirt sale
- Dunk tank
- Alumni donations
- Fashion show
- Singing telegrams
- Sell candy canes at holiday time
- Sell stadium seat cushions
- Sell flowers for special occasions
- Sell pumpkins at Halloween time
- Create & sell a calendar
- Pie auction: Bid for the privilege of throwing a pie into another person’s face
- Sell small throw pillows with the name of your organization glued on in felt
- Sell miniature paddles with the Greek letters or your organization’s name painted on it
- Have a carnival booth at Homecoming, Greek Week, or Family Weekend
- Watermelon contests: seed spitting, eating the fastest, eating the most, throwing, etc.
CORPORATE SPONSORSHIP

Adapted from Ball State University Downloads for Student Organizations and Advisors

Contact FAU Business Services with specific questions.

One of the best ways to increase fund raising efforts is to obtain corporate sponsorship for an event, either through underwriting or direct contributions from companies. Corporations will help to fund an event if it is in their marketing plan. Are their customers likely to come to this event? Will sponsorship in an event help them attract new customers and get their name seen? Make sure that corporate sponsorships do not conflict with current university sponsorships (i.e. Pepsi, Bank Atlantic).

How to Ask for Corporate Funding

- Plan far in advance. Most corporations plan their donation budgets six to twelve months in advance. Talk to a company as early as possible. Do not expect to get donations in a month.
- Try to target a specific company who could definitely benefit from your cause rather than sending out blanket letters to everyone. By matching your cause and the company, there are better chances for a positive answer.
- Learn as much about the organization you are soliciting before you actually ask for a dime. Knowledge of the company, their products and services, and their past charitable events will help see if they are the right match for you.
- Address your pitch letter to the person in charge. Call and obtain the person’s appropriate name and title.
- Put your proposal in writing. Enlist the help of your marketing and business majors to write the proposal in marketing terms.
- State your cause in terms of benefits to the company. For example, a $25 ad in an ad book or a $25 poster that is going to be seen by 1,000 students at an event is inexpensive advertising for even small businesses.

Who to Ask

Since so many organizations are in need of the same kinds of donations and will be asking the same companies, it is a good idea to think of all the different possibilities. Your best efforts will be made with those firms and companies that primarily market their products or services to college-age students. Some examples are:
- Businesses located around campus are good, but sometimes they are overused and get approached a great deal. Be creative.
- Fast food companies (ice cream, frozen yogurt, hamburgers, etc.). You may need to ask the local manager or may need to write their district office. Many local fast food chains will provide free punch and drink cups if you are having a sporting event or project to benefit a local charity.
- Real estate companies that specialize in rentals to college students; Sportswear and clothing manufacturers or health clubs.

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

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

COMMERCIAL SOLICITATION POLICY

OBJECTIVE

To specify the methods and responsibilities for commercial solicitation at Florida Atlantic University.

OVERVIEW

All soliciting done on the University premises must be approved by the Director or Assistant Director of Business Services, except certain approved activities sponsored by student organizations or university departments which are subject to the approval of the Office of Student Involvement and Leadership.

1. Commercial solicitation as used herein is the offering of goods and services for sale either by advertising or direct sale that result in financial gain to the salesperson, individual(s) or organization(s).
2. Activities referred to in this section are permitted only in the area of the Student Union, Traditions Plaza, and along the Breezeway on the Boca Raton campus. Any requests for exceptions to these locations should be submitted to the Office of Student Involvement and Leadership for university organizations and to the Office of Business Services for non university entities.
A. UNIVERSITY SOLICITOR’S PERMIT

1. All solicitors must have a University Solicitor’s Permit, except students representing student organizations.
2. All applicants for a permit must have in their possession verifiable personal and company or organization identification for all persons who will be engaged in the requested activity.
3. The University Solicitor’s Permit will contain the following information:
   a. Name of the company or organization.
   b. Names of individuals representing the company or organization on campus.
   c. Type or nature of approved Business.
   d. Location where permit is valid.
   e. Dates of issue and expiration of University Solicitor’s Permit.
4. Copies of the University’s Solicitor’s Permit are to be given to the individual responsible for the activity, who will ensure that each person engaged in soliciting has a copy. The original permit will be kept on file in the Business Services Office.

B. OBTAINING PERMITS
Permits are to be obtained from the Director or Assistant Director of Business Services at least seven (7) business days prior to the scheduling of the event. The issuance of permits will be governed by the benefits to be gained by the University community. Copies of the permits are to be carried by each individual whose names appears on the permit and are engaged in the activity and will be presented to any University official upon request. Any issued permit is subject to cancellation at any time it is deemed in the best interest of the University. In the even a permit is canceled, all copies of the permit are to be surrendered to the Director of Business Services and soliciting by permit holders will cease.

C. STUDENT ORGANIZATIONS
In recognition of the rights and freedom of student organizations at Florida Atlantic University, approved student groups are permitted to solicit for support or sell and distribute items as a project of that organization within the following limits and guidelines:
1. No item is sold or advertised that is offered for sale in, or that is in competition with, any University agency such as the Bookstore, Food Services, Office Services, or retail stores located on Florida Atlantic University campuses, without a University Permit granted by the Director of Business Services.
2. Sponsoring and participating organizations must register the activity and arrange for space with the Office of Student Involvement and Leadership.
3. Sponsoring and participating organizations must comply with any Student Government Statutes affecting fund raising projects.
4. Officers of any student organization sponsoring or participating in solicitations either on or off campus will assume full responsibility for adherence by participating students to all laws and regulations governing such activities.

D. VENDORS AND NON UNIVERSITY ENTITIES

Vendors other than recognized on campus vendors may request space on campus. Ten tables have been allocated daily, with the exception of recognized campus holidays and closures, along the Breezeway on the Boca Raton campus for vendors and non university entities. Requests are to be made through Business Services for space and all requests should have a Commercial Solicitation Permit Application.
attached. The designated spaces are on a first come, first serve basis. Requests will be reviewed and approved based on meeting all other guidelines set forth in this policy. Proof of insurance must accompany the request as well.

E. ITEMS FOR SALE
The University will not allow the selling of any items, including but not limited to guns and knives, which will pose a threat to the individual who made the purchase or to their surrounding environment. In the event this occurs, the solicitor will be asked to cease selling the particular item and if the vendor does not abide by the request, they will have to vacate the premises.

F. ADVERTISING MATERIALS
The posting or distribution of advertising materials will be limited to the permanent official bulletin boards of the University and according to policies set forth by Student Development and Activities.

G. DOOR-TO-DOOR SOLICITATIONS
Under no circumstances will door-to-door solicitation be allowed in any university facility.

H. STATEMENT OF EQUITY
Nothing in this policy or its regulations is intended to infringe upon any constitutional or other legal rights regarding freedom of speech. This policy and regulations exist to ensure the privacy, safety, educational and work environment of campus occupants. Application of this policy and regulations will be neither arbitrary nor capricious, nor shall they be based on the political content of the solicitation. All constitutionally protected speech will be permitted within the reasonable time, place and manner parameters of this policy and regulations.
Event Planning Considerations / Timeline

**Brainstorming**
- **Survey students**: What types of programs do students within and outside of your group want to attend?
- **Review past program evaluations and reports**
- **Establish budgets**
- **Determine audience**: Campus only? Open to general public? All-ages? Family?
- **Choose events**: Does it meet your mission? Does it move your organization forward? Does it serve your target audience?
- **Choose event coordinator**: Assign a point person and event committee, if necessary
- **Check other calendars for conflicts**: Other student organizations, athletics, scheduling office, academic calendar, holidays
- **Fill out Program Registration Form**: Submit to Student Involvement and Leadership, Room 203 in the Student Union
- **Reserve locations**: Remember rain locations, green rooms, and dressing rooms for performers
- **Contact agents, performers, or vendors**: Get necessary information; don’t verbally commit to anything
- **Consider liabilities and risks associated with proposed events**
- **Identify possible co-sponsors**
- **Consider the people-power needed to events**: Be realistic with your resources
- **Create event checklist**: Identify tasks, dates, and specific people responsible for each item on the list

**Planning**

*(Two – Three Months in Advance of Event)*
- **Contract any performers or vendors for your event**: Contracts are legally binding documents; be sure to work with someone from Student Involvement and Leadership throughout the entire process.
- **Process payments**
- **Reserve hotel rooms for performers or vendors**
- **Obtain meal tickets for performer meals**
- **Arrange transportation or obtain parking pass for performers**
- **Order supplies**: Decorations, tickets, wristbands, raffle tickets, t-shirts, awards, promotional items, etc.
- **Identify target marketing groups**: Create a comprehensive marketing/promotional plan
- **Create a space plan**: Draw the layout for your event
- **Create an equipment list**: Ensure you have all of the equipment you will need – borrow, rent, or buy what you don’t have
- **Reserve tables**: Contact Space Utilization to do so
- **Contact FAU Police if security is necessary**

**Planning**

*(One Month in Advance of Event)*
- **Begin promotion for event**: Posters, verbal advertising on Breezeway, myFAU announcements, etc.
- **Review technical / hospitality riders**: Arrange for all considerations
- **Order food for event from Chartwells**: Backstage refreshments, meals for performers, meals for crews, concessions; Considerations: How many people? What can you afford? Seek donations if appropriate. Don’t forget vegetarians.
- **Confirm security**: Kim Valinski, 7-4107
- **Arrange for parking**: Traffic and Parking, 7-2771
- **Talk with campus media for advertising and coverage of event**: University Press & OWL TV
- **If open to the public, contact other schools or related organizations**
- **Start to determine staffing needs**: Be specific with duties and responsibilities
- **Obtain volunteers**
- **Use committees**: Delegate responsibilities and authority
  - **PR crew**, photographer, ticket-takers, house manager, ushers, box office, concessions, security, load-in/load-out crews, runners, electrician, sound board, master/mistress of ceremonies, welcome committee/guest liaison, etc.
- **Delegate creation of signage needed**: “No photos/recording devices”, directional signs, sponsorship banners
- **Revisit and update marketing campaign**: VITALLY IMPORTANT!
- **Complete Program Checklist Form**
## Event Planning Considerations / Timeline, continued

### Planning
*(Two Weeks to One Week in Advance of Event)*

- Distribute promotional material / Advertise: Create a Facebook event!
- Pick up supplies
- Finalize volunteer staff
- Create access badges/passes and list of recipients
- Create list for reserved seating/backstage passes
- Pick up performer’s check: Store in a safe place!
- Confirm all details with agent or vendor
- Send performer/agent information pack: Arrival time, parking information, directions, etc.
- Ensure that all organization members and volunteers will be in attendance
- Gather performer welcome pack/hospitality rider materials
- Create a day-of-show schedule with times and responsibilities

### Day of the Event

- Get there early! Make sure supplies are ready to go
- Place any signs and decorations
- Hand out flyers to passerbys
- Everyone wear event t-shirt if possible
- Set up dressing room/backstage area
- If you have more upcoming events, promote them at this event!
- Make sure someone is at venue to greet performer/vendor/guests
- Make sure all appropriate persons are present for sound checks or general setup
- Make sure you have an introduction to read before the performer takes the stage – OK it with them first
- Provide water for stage
- Keep event on schedule
- Take pictures!
- Count attendees
- Make sure students have breaks during the event
- Pay performer/vendor at conclusion of performance
- Assist performer/vendor with cleanup; Escort them back to their car
- Clean-up following performance
- Inventory equipment and assess any damage; return borrowed equipment

### After the Event

- Remove all advertising displays and posters around campus
- Settle with all ticket outlets
- Turn in receipts
- Deposit cash
- Create a final budget of all expenditures
- Restock/order supplies if necessary
- Distribute thank yous for appropriate parties
- If payment was being mailed, follow up with agent/vendor to ensure it was received
- Jot down notes for file and future programs: Attendance, budget with receipts, whether program met goals, strengths & weaknesses, personal and audience response to event, recommendations for new procedures, etc.
- Complete a program evaluation/summary form: Ideally with input from committee and volunteers

ENTERTAINMENT SERVICES AND CONTRACTS

If your student organization would like to bring entertainment to campus (i.e. DJ, musician, comedian, speaker, performer, etc.), please visit the Office of Student Involvement and Leadership (SIL) for information and support at least three weeks in advance of the event/program. A contract will be necessary in order for the entertainment to be paid and/or use space at FAU. Additionally, such elements as security, technical needs, University policies and procedures, etc. will need to be discussing prior to the student organization securing a contract for the event/program. The SIL staff is available to help your student group with the contracting process.

Needed from Student Organizations for Entertainment Services & Contracts

1. Student Organization completes and submits Facility Request Form to the Office of Student Involvement and Leadership (SIL), Student Union room 203.

2. Student Organization completes and submits a Performance Agreement Worksheet to SIL, along with any supporting documentation (contracts or estimated invoices).

3. SIL will create Performance Agreement (using the Worksheet). This Performance Agreement will be sent by SIL to the Attorney’s Office and then to Purchasing to be signed by FAU.

4. Once ready, SIL will call Student Organization to pick up signed contract. Student Organization will need to obtain signature from performer on the contract.

5. Student Organization must obtain tax information form from performer.
   a. If performer is using a tax ID number, a W-9 must be completed.
   b. If performer is using a social security number, a W-9 and an Independent Contractor Worksheet must be completed.

6. Student Organization obtains an invoice from performer.

7. Student Organization completes an Expense Justification Form, which is online at http://www.fau.edu/sga/pdf/Expense_Justification_Form.pdf

8. Student Organization prepares a Banner Requisition, which is online at http://www.fau.edu/purchasing/req.xls.

9. Student Organization provides the following forms to Student Government Boca Treasurer if using SG funds, or SIL if using Club Revenue Account:
   a. Signed Facility Request Form
   b. Expense Justification Form
   c. Banner Requisition Form
   d. Performance Agreement
   e. W-9 form (and Independent Contractor Worksheet if applicable)
   f. Performer’s Invoice

10. Boca Treasurer (if using SG funds) or SIL Staff (if using Club Revenue Account) processes packet of forms for final approvals and forwards to Purchasing to have PO created.

11. Student Organization must then submit performer invoice to Boca treasurer, indicating Okay to Pay.

This process takes time (usually about 2 weeks), so please allow ample time when submitting forms.
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!

Be sure to utilize the resources that the FAU CLUB HOUSE offers.
Clubs can blow up balloons; make posters and buttons, copy flyers, and more!
Visit the Club House in Room 206 of the Student Union.

ON – CAMPUS
- Contact Media Relations, 7-4422, for a press release
- Explore digital means of spreading the word: Facebook events, myFAU announcements, emails, etc.
  - Contact University Press & local newspapers for placement in their calendar of events.
  - Create flyers for posting on campus bulletin boards. Get approvals as necessary.
    - Write a note on classroom white boards/ chalkboards.
  - Contact OWL Radio or local radio and ask if they’d donate a PSA.
    - Purchase professionally created posters.
  - Chalk sidewalks in prominent locations around campus.
  - Create table tents for display (get approval first).
- Have a display or table in the Breezeway with flyers and free giveaways.
- Ask faculty to announce the event in their classes or to offer extra credit if your event is related to their class.
- Have a mini-event as a teaser in the middle of Center Marketplace or the Breezeway.
- After getting permission, use masking tape on the floor to spell out the details of your event.
  - Order food from Chartwells as an enticement for students to come to the event.
  - Obtain permission from Res Life to place postcards in residents’ mailboxes.
  - Use A-frame boards around campus to display posters around campus.
    - Go to other organizational meetings to announce your event.

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

TIPS FOR EVERYWHERE
- Word of mouth is important! Get people excited about your event. Talk it up and involve others.
  - Create quarter flyers to hand out.
- Use BIG posters (like on butcher paper) or odd sizes/shapes to catch people’s attention.
- See if your performer has professionally made posters you can use for free. You may need to write dates, times, and locations on them.
- Create a webpage or Facebook event to specify the details of your event (and make sure to publicize the webpage!)
- REMEMBER – People love to be in the know, and they love freebies! You can’t beat free food!

Some information provided by Shana Warkentine Meyer, K-State at Salina
Event Report

Event: ________________________________________________________________
Organization: __________________________________________________________
Date: ___________ Time: ___________ Location: _____________________________
Coordinator(s): _________________________________________________________
Attendance: ________________________ Total Cost: ___________________________
Co-Sponsors: ___________________________________________________________

Description of Event: ______________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________

Strengths of Event: _______________________________________________________
_________________________________________________________________________

Weaknesses of Event: ______________________________________________________
_________________________________________________________________________

How does this program enhance the academic environment of FAU?

How does this program enhance the social environment of FAU?

How is this program inclusive of all members of FAU?

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

How did you utilize co-sponsors in the event process?

Would you recommend this event to next year’s chair? Why?

Other comments?
ADVISOR’S SELF-EVALUATION CHECKLIST

Please answer the following questions as they relate to your role as a student organization advisor.

Fill in the blanks in front of each question using the following scale:

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

_____ I actively provide motivation and encouragement to members.
_____ I know the goals of the organization.
_____ I know the group's members.
_____ I attend regularly scheduled executive board meetings.
_____ I attend regularly scheduled organizational meetings.
_____ I meet regularly with the officers of the organization.
_____ I attend the organization's special events.
_____ I assist with the orientation and training of new officers.
_____ I help provide continuity for the organization.
_____ I confront the negative behavior of members.
_____ I understand the principles of group development.
_____ I understand how students grow and learn.
_____ I understand the principles that lead to orderly meetings.
_____ I have read the group's constitution and by-laws.
_____ I recommend and encourage without imposing my ideas and preferences.
_____ I monitor the organization's financial records.
_____ I understand the principles of good fund raising.
_____ I understand how the issues of diversity affect the organization.
_____ I attend conferences with the organization's members.
_____ I know the steps to follow in developing a program.
_____ I can identify what members have learned by participating in the organization.
_____ I know where to find assistance when I encounter problems I cannot solve.
ADVISOR/STUDENT EVALUATION AND FEEDBACK TOOL

Please take 15-20 minutes to share your thoughts on the questions and statements listed below.
Your feedback is valuable to my professional development.
Please use a scale of 5-1 to rate your answers, 5 being the best score.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

FLORIDA ATLANTIC UNIVERSITY
Student Involvement and Leadership
IMPORTANT CONTACTS

Office of Student Involvement and Leadership  7-3735

Business Services  7-2041

Campus Recreation  7-4512

Center for Civic Engagement and Service  7-3607

COSO  7-3893

Event Planning Office  7-3734

Greek Affairs  7-3269

Housing and Residential Life  7-2880

Marketing and Creative Services  7-3025

Media Relations  7-4422

Multicultural Affairs  7-3959

Police  7-3500

SAVI  7-0246

Student Government Association  7-3740

Student Union  7-3730

Today and Beyond Wellness (Ropes Course)  7-0153

Traffic & Parking  7-2771

ADDITIONAL RESOURCES

FLORIDA ATLANTIC UNIVERSITY
Student Involvement and Leadership


**ONLINE RESOURCES**

**Student Organization Advising Resources Online**

**Icebreakers and Team builders Online**
- http://www.mindtools.com/
- http://www.byu.edu/tma/arts-ed/home/games.htm
- http://www.ag.ohio-state.edu/~bdg/
- http://adulted.about.com/od/icebreakers/