

# SIUe

Student Organization Advisor Handbook

2020-2021

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## **A Note from the Kimmel Student Involvement Center**

Welcome to the wonderful world of student organization advising! You have made a very important commitment to the development and growth of our student organizations, and the Kimmel Student Involvement Center appreciates you. Whether you are continuing in this role or just beginning, you are providing a valuable service to the organization and you will make a significant difference for the students. By agreeing to serve as advisor, you have demonstrated a commitment toward the total development of students, and we appreciate your willingness to accept this role.

It is an honor to be selected by the students as an advisor; it indicates the students' respect and trust for you. This position can be tremendously rewarding for both you and the organization.

An effective advisor is a crucial link in an organization's success. Advisors act as role models to students and provide a vital link between students and the faculty and staff. Advisors provide continuity and a voice of experience to the organization. As an Advisor, you serve as an integral part of the student experience and can impact the growth of students in many ways. The position also provides an opportunity to offer advice, be in contact with students outside of the regular working environment, and be involved in campus life.

A strong advisor can make a difference in the life of a student. This position can be challenging and fun; however, with the position also come several responsibilities. This document is designed to provide you with resources on how to be a successful advisor. If you find that you need more information on specific SIUE or Kimmel Student Involvement Center policies, please refer to the Student Organization Handbook.

## **Advisor Requirements**

SIUE requires that all student organizations have approved advisors. All full time University employees are eligible to serve as advisors for student organizations. Graduate assistants and student employees are not allowed to serve as advisors or fiscal officers. Once an employee accepts the role and responsibility of advisor and/or fiscal officer for a student organization, the employee agrees to uphold the policies and procedures of the University as outlined by the Southern Illinois University Board of Trustees.

If an advisor no longer wishes to continue with the organization or leaves the University, the organization will be placed on probationary status until a new advisor has been identified. The president of the organization is responsible for notifying the Kimmel Student Involvement Center of any changes in advisor information.

## **Advisor Responsibilities**

Each advisor perceives their relation to a student organization differently. Some advisors play very active roles by attending meetings, working with student officers, and assisting in program planning and development. Others maintain a more distant relationship to the organization. Advisors should be both accessible and interested in the functions of the student organizations.

An advisor accepts responsibility for keeping informed about activities of the organization and for advising officers of the organization on the appropriateness and general merits of policies and activities. However, advisors are not responsible for the actions or policies of student organizations; the students are solely responsible.

Some of the ways you can support your student organization as an advisor include:

- Attending meetings and functions of the organization,
- Acting as a source of general information regarding University policies and procedures,
- Encouraging organization members to assume responsibility for their actions and for the success of their programs,
- Being available to officers and members of the organization to share ideas about the activities of the organization,
- Overseeing financial transactions of the organization,
- Being familiar with the organization's history,
- Providing continuity,
- Assisting with new officer transition,

- Assisting with the establishment of realistic goals,
- Ensuring organization operation sustainability
- Evaluating progress made toward goals

Organizations and advisors should openly discuss the advisor's role and establish reasonable expectations. Materials to assist in having these conversations are available in the Advisor Development section of this handbook.

### **Fiscal Officer Requirements**

All student organizations are required to have a fiscal officer. Most of the time, the student organization's advisor also serves as the student organizations fiscal officer. Below are the requirements to become a fiscal officer:

- The fiscal officer must be a full time SIUE employee (not a graduate assistant or student employee.)
- Fiscal officers must sign an Attestation form and a Responsibility form in accordance with the Oracle Administrative Information System (AIS).
- Fiscal officers are recommended to attend Oracle training sessions (University Accounting) before a password is issued in order to access the AIS system for generation of a monthly statement.
- It is the fiscal officer's responsibility to be aware of the financial resources available in the account and to ensure that the account is not over committed. Fiscal irresponsibility will not be condoned. Commitments in excess of available funds will be returned to the fiscal officer.
- Acceptance of the fiscal officer responsibilities of an account includes responsibility for the personal property (inventory equipment) charged or to be charged to the account in addition to responsibility for the control of the financial resources of the account within the terms of the approved Account Request form. A current list of all personal property charged to the account may be secured by contacting the Property Control Section of the Administrative Accounting Office. When a change of Fiscal Officer occurs, it is important that the retiring officer verifies the existing inventory and "sign off" so that the incoming fiscal officer may establish the inventory for which the new fiscal officer is responsible. A copy of the Property Control Manual for fiscal officers is available from the Administrative Accounting Office—Property Control Section.

### **Student Organization Funding**

An 8-account is the University's version of a personal savings/checking account for a Student Organization.

Student Organizations who do not currently have an 8-account and want to apply for one need to begin the process through the Kimmel Student Involvement Center. A

Request for New Account Form must be completed and a fiscal officer's signature is required.

Recognized Student Organizations that purchase services or supplies from SIUE departments (i.e., copies, refreshments, audiovisual charges, facility charges, etc.) or who do not receive funding from Student Government may find it convenient to have a University 8-account.

There are specific procedures to be followed when depositing into and requesting expenditures from 8-accounts. The staff of the Kimmel Student Involvement Center is available to assist organizations with these processes.

While the organization's finances should be handled by the treasurer and president, the advisor should also take part in organization's finances. Many organizations maintain a checking account at a local bank. It is suggested that the president, treasurer, and advisor be authorized to secure funds for disbursement to keep proper control of the organization's funds. The group should stipulate that the bank process only checks with two of the three authorized signatures.

The best place to send an organization's bank statement is to the organization's campus mailbox. Since most organizations have new officers at least once a year, the permanent campus address of the organization will ensure that the statements reach the organization instead of a past officer. Bank statements will be locked in a secure area of the Kimmel Student Involvement Center. A notice will be placed in the organization's mailbox indicating that they need to pick up the statement from the Kimmel Student Involvement Center front desk.

### **Use of External Bank Accounts**

While SIUE prefers recognized student organizations to solely use the University 8-accounts created for student organizations, external bank accounts may be utilized for enhanced access to liquid assets obtained through donations and fundraising. In agreement with Busey Bank (formerly The Bank of Edwardsville), the following policies must be adhered to:

- Advisors/fiscal officers (full-time employees of SIUE), must be listed on the bank account. They must be listed as an authorized signature
- In the event a change occurs with an organization's advisor/fiscal officer or they are no longer employed at SIUE, Busey Bank will require written authorization from said advisor (or the Kimmel Student Involvement Center, if the former advisor is not available) to include the new advisor on the bank account.

- All individuals listed as signatories on the organization's bank account must be present in the event of an account change (adding/removing signatories, for example).
- The advisor/fiscal officer will be responsible for creating a new EIN for the creation of a bank account for a student organization. A secondary piece of identification for the student organization will be required (proof the organization is formed and recognized by SIUE such as meeting minutes, a website, etc.). The organization's name and individuals listed on the account must be included on the secondary piece of identification.
- In the event an account needs to be closed (organization inactivity, organization revocation, etc.), any funds in the account will be distributed via cashier check, money order, or personal check (no cash will be allowed to be distributed).
- The Kimmel Student Involvement Center will communicate regularly with Busey Bank when recognized student organizations have been revoked or have been inactive for more than 1 year to determine status of accounts.

## **Funding from Student Government**

Student Activity Fees are collected from all students and administered under the jurisdiction of the Vice Chancellor for Student Affairs. The Vice Chancellor for Student Affairs has delegated authority to administer the funds to Student Government under the guidance of the Kimmel Student Involvement Center.

The Student Government Office serves several functions in support of student organizations:

- Assists student organizations in the management of their funding request accounts
- Advises and trains student organization leaders on the funding process
- Provides accurate bookkeeping and reporting services
- Ensures adherence to all University policies and procedures
- Ensures that the funds allocated to student organizations are expended as approved

Registered student organizations are eligible to apply for funding in the following areas:

- Annual Allocations
- Programs
- Travel

New student organizations are eligible to apply for annual allocation funding 30 days after official recognition by the Student Senate, 60 days after official recognition for program funding, 90 days after official recognition for travel funding.

**Funding is available on a first-come, first-served basis due to limited funds.**

### **Process for Obtaining Funds**

No organization or event shall be funded if it discriminates on the basis of race, color, sex, religion, national origin, age, sexual orientation, disability, or other factors covered by law.

**Any student organization that owes funds to the University or outside businesses or entities will not be eligible to receive any new funding until the outstanding balance has been paid.**

Funding request forms are available in the Student Government Office. All requests for funding must be submitted through the Student Government Finance Board. The Finance Board reviews all student organization funding requests based on the merits of the request and the policies approved by the Student Senate. The Finance Board then submits its recommendations to the Student Senate for approval. The Kimmel Student Involvement Center determines final approval.

Annual Allocation requests for the following fiscal year are approved during the Spring semester. For an organization to be considered for funding, an Annual Allocation request must be submitted to the Student Government Office. The deadline will be posted and announced by the Finance Board Chair.

Program requests must be submitted to the Student Government Office **at least** ten (10) weeks prior to the event. Travel requests must be submitted to the Student Government Office **at least** forty-five (45) days prior to travel.

**No late submissions will be heard.**

To learn more about the process to receive Annual Allocations, Program Funding, or Travel Funding please refer to the Student Government Funding Manual.

The manual can be found on the Student Government website,  
<http://www.siu.edu/kimmel/sq>



# **Important University Policies and Procedures**

## **Hazing & Pre-Initiation Activities**

(University Policy)

Members of student organizations or other persons associated with activities of student organizations may not engage in any hazing activities that pose any risk of physical or psychological injury to any person.

Hazing in any form is an inappropriate activity. By definition, an act of hazing includes all conditions described by Illinois statutes and/or any activity or attitude, mental, emotional, or physical which ridicules, degrades, embarrasses, leads to confusion or frustration, causes discomfort, or jeopardizes the health, welfare, and safety of an individual or group. Specifically, hazing includes, but is not limited to, the following:

- any activity that might reasonably bring embarrassment or emotional harm to the individual;
- any activity that might reasonably bring physical harm to the individual;
- any activity that requires an unreasonable or inordinate amount of the individual's time or in any manner impairs the individual's academic efforts;
- any activity that requires consumption of any liquid or solid matter;
- any activity that would degrade or otherwise compromise the dignity of the individual, or any requirement which compels an individual to participate in any activity which is illegal or contrary to an individual's genuine, moral, and/or religious beliefs or contrary to the rules and regulations of the University.

Any acts of hazing by an organization and its members, either on or off campus, are strictly forbidden. Hazing is a Class B misdemeanor under Illinois law. Any organization that engages, through any or all of its members, in any act of hazing is subject to severe disciplinary action, defined and outlined in the student code of conduct, including, but not limited to revocation of recognition as an organization at SIUE.

## **Student Conduct**

Student Conduct will notify organization advisors and a national organization affiliate, if applicable, of the outcome of any conduct proceedings. Kimmel Student Involvement Center staff will also be copied on any correspondence to the student organization, advisor(s), and national organization (if applicable). More information regarding the Student Organization Conduct Process can be found in the Student Organization Handbook.

## **Risk Management**

Southern Illinois University maintains a general liability insurance program. The programs cover University employees while acting within the scope of their

responsibilities to Southern Illinois University. This includes RSO advisors, who are employees or volunteers, responsibly performing duties with the scope of being an advisor. Program details and exclusions can be found at: <http://siusystem.edu/risk-management/generalandprof.shtml>

Southern Illinois University organizations, clubs, sport clubs, and officers of these respective groups are not ordinarily covered by SIU's general liability insurance program. These organizations, officers, and individual members can be sued for negligence and held personally liable for damages. Therefore, these organizations need to consider and address risk inherent in any activity or event. This includes considering general liability insurance for the organization and events.

SIU may require such organizations to provide proof of general liability insurance, other insurance, and signed participant waivers for activities held on campus or coordinated through the Kimmel Student Involvement Center. These will likely be required for the following events or activities:

1. Anticipated attendance is above 100
2. Police are needed
3. Significant community presence is expected
4. Involving alcohol
5. Involving travel
6. Considered high risk\*

A copy of the approved waiver may be found in the appendices and is also available in the self-help area of the Kimmel Student Involvement Center on the Kimmel Student Involvement Center website.

\*(including but not limited to combustible material (including firearms, engines, rockets, etc), inflatables, water activities, livestock, horseback riding, weapons, activities above or below the earth, Club sports, International travel, and martial arts)

## Appendix: Additional Resources

### Student Organization Leader/Officer Transition Guide

A thorough and intentional Leadership Transition plan will provide an organization with continuity so that next year's officers can build on the knowledge gained rather than starting from ground zero. Below are only suggestions, take pieces that work for your group.

#### Tips for a successful transition

- When new officers have been elected, orient them together as a group with all of the outgoing officers. Try going on a retreat together. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team. Outgoing officers should openly share what they believe went well and what they would change if they had it to do over again.
- Make introductions to resources. Schedule time to walk around campus with the new officers and introduce them to important people who can serve as key resources (Advisor, Kimmel, Event Services, etc.).
- Recognize your outgoing officers. Could be certificates, gifts, thank-you cards, etc. Show your group that leaders are valued and an important part of your organization.

#### The Basics

- Register your organization through Get Involved at SIUE. This is done annually each spring
- Ensure you transition your [Get Involved](#) page to the new officers. You can access "how to guides" online to assist with this transition [here](#).
- Give access and instructions to any other online platforms, including (but not limited to):
  - Email accounts
  - Social media accounts
  - External websites
  - Online document storage (Dropbox, Google Drive, etc.)
  - National affiliation website login information
- If your organization holds space (desk or locker) in the Kimmel Student Involvement Center, ensure the key is passed on to the new leadership (and that they know where your space is and the requirements for use of the space)
- If you transition officers AFTER you register your organization for the year, complete the officer change form [here](#).
- If you transition officers BEFORE you register for the year (in the spring), complete the online registration process through Get Involved at SIUE
- Explain how to reserve space on campus through Event Services

- If your organization received annual allocations through Student Government, make sure the new officers are aware of the process to spend those funds

### **Share all organization documents**

Share documents electronically to allow new officers to easily update. Hard copy binders are an option as well, but harder to pass along to future leaders or edit documents. You can load any documents your organization needs to use to your Get Involved page. Some organizations also use Google Drive and/or Dropbox to help store documents online easily. Below are ideas of what to include:

- Constitution/Bylaws
- Mission, philosophy, goals and/or purpose of organization
- Organization history
- Budgets/Financial Reports/Bank Statements
- Meeting minutes
- Agendas
- Any evaluations of events/programs
- Calendar of events/deadlines
- Officer position descriptions
- Committee position descriptions
- Election process and timeline
- Membership recruitment information and timeline
- List of members and their contact information (email, phone number, etc.)
- Membership application
- Past correspondence
- Event planning guides for any annual events
  - Copies of flyers/posters from events
- Marketing materials including logos, posters, photos

### **Finances**

- Discuss the financial status of the organization
- Share where your organization receives money from
- If your club received annual allocation funding, share information and budget
- Get new leadership on as signers on your bank account and remove old leadership.
  - Pass on any online bank passwords.
  - Discuss any fundraising plans or goals
  - Pass along checkbook
- Documents to share: Budget spreadsheet, past student organization funding applications, any approved budgets

## **Sample 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 document reviews some possible position responsibilities.

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 how the officer allocates their time. 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, classes, and other activities of the organization
- Obtains appropriate facilities for organization activities
- Completes annual registration forms
- 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

### **Role of the Vice President**

*Some Potential Responsibilities:*

- Assume the duties of the President as needed
- Plans officer's orientation and organizational retreats
- Assists other officers with tasks as needed
- Coordinates organizational recruitment efforts
- Represents organization at official functions

### **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
- Prepares organization's calendar of events

- Prepares and files any report required
- 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, etc.)
- Coordinates fundraisers

**Other possible positions:**

Parliamentarian, Programming/Events, Standards, Recruitment, Community Service, New Member Educator, Social Media Manager, etc.

## Advisor Expectations Agreement

Each advisor perceives his/her relation to a student organization differently. Some advisors play very active roles by attending meetings, working with student officers, and assisting in program planning and development. Others maintain a more distant relationship to the organization. Advisors should be both accessible and interested in the functions of the student organizations.

**Directions:** The advisor and organization leader(s) should meet to complete this agreement together and discuss expectations of the advisor. For items that are determined not to be the responsibility of the advisor, it may be helpful to assign that task to a specific officer.

Name of Student Organization: \_\_\_\_\_

Date of Completion: \_\_\_\_\_

Advisor Name	Signature
Officer Name	Signature
Officer Name	Signature
Officer Name	Signature
Officer Name	Signature

By signing this agreement, the advisor and officers of the student organization agree to have a positive working relationship and meet stated expectations agreed upon above. In addition, the advisor and officers agree that they will communicate to one another if expectations are not being met or need to be revised throughout the academic year.

