Student Organization
Advisor Handbook

STRAIGHT TO THE SORC
Student Organization Resource Center
East Tennessee State University
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Introduction

It is an honor to be asked by a student organization to serve as the faculty advisor. It implies the students’ respect and trust for you. They view you as someone who is willing to spend time with them and the organization. East Tennessee State University, especially the Student Organization Resource Center, appreciates the time, effort, and concern for the students you give by accepting the responsibility of becoming a faculty advisor.

Each group has its own specific needs and expectations for its advisors but these may change from year to year. While it is not possible to establish a single model to serve as the standard for all groups at all times, there are some general ideas which would apply to almost every advisory role.

Before a faculty or staff member agrees to be an advisor, she or he should have some basic knowledge as to the purposes and structure of the group to be advised. This can be done through a review of the group’s constitution, attendance at an organizational meeting, and discussion with the group’s officers prior to accepting the role of faculty advisor.

Once you accept the position of faculty advisor, you will fill out the appropriate forms required for registration of a new organization or an updated organization (Organization Registration Form and Faculty Advisor Form), and you will work with the officers (new or old) and the SORC staff in the development of goals and objectives for the new organization.

One important role for an advisor is to act as a resource to the organization. The advisor brings personal experience and expertise to a student organization. This can be crucial to the success of the group. In addition, the advisor generally has had experience with the university system and can often provide significant directions to students in ways of getting things done within the university setting.

The advisor needs to know about the group’s finances and budget. Since the advisor’s signature is needed for agency account funds it is incumbent upon the advisor to be very knowledgeable about the student group’s finances. It is often through the development of an organization’s budget and subsequent implementation of the budgeted programs that an advisor can be of great assistance in the development of a group’s programs.

The advisor must be willing and able to devote time and energy to the student group. This is not to say that an advisor must attend every meeting or activity of the group, however, he or she should maintain a continuing contact with the officers of the organization. The officers of the organization and the staff in the SORC have a responsibility to keep you informed. You should ask the officers to set regular meetings with you. Students find the formal and informal contacts with their advisors to be richly rewarding, and they are necessary if the group is going to maintain a continuing pattern of vitality.

The staff in the Student Organization Resource Center are happy to support you in your role as advisor. Our office is located on the lower level of the D.P. Culp Center.

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Advisor Roles

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

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

Following are some of the roles you may assume as an advisor:

**Mentor:**

Many students will come to see their advisor as a mentor and the success of these relationships can last many years and be rewarding for both the student and the advisor. If the student is seeking an education and a career in your field, you may be asked to assist in his/her professional development. To be effective in this capacity, you will need 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 to discuss their issues with each other. In many cases, it may be necessary to remind them that they both want what is in the best interest of the organization. Ask them how they think they can work together, point out the organization’s mission, and ask how their conduct is helping the group achieve its mission. Sometimes, one student may be causing problems with other students. In many cases this student may not realize that his/her actions are causing a problem. In this case, speaking with the student individually could be helpful. Chances are that no one has met with the student previously and discussed how his/her attitudes are impacting other people and how those attitudes or actions can be changed to make everyone feel better. In many cases, the student will appreciate honest feedback.

**Reflective Agent:**

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

**Educator:**

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

**Motivator:**

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

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

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

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

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

- Assist officers with procedural matters. Be knowledgeable of the organization’s purpose and constitution and help the general membership adhere to them.
- Be knowledgeable about, and comply with federal, state and local laws and ordinances, as well as campus policies. Inform the group of pertinent policies.
- Empower students to take action and to take satisfaction in seeing the student organization succeed.
- Allow the group to succeed, and allow the group to fail. Learn when to speak when not to speak. Remember to let the students make the decisions while you provide guidance and advice.
- Represent the group and its interests in staff and faculty meetings. Reach out to other advisors or departments (i.e. Student Organizations) for assistance.
- At the beginning, develop clear expectations about the role of the advisor and your relationship to the organization.
- Read the group’s constitution.
- Get to know all of the members on an individual level. Learn what they want to get out of the organization. Maintain a complete officer and membership list with addresses and phone numbers (or know where to easily find one).
- Develop a strong working relationship with all the officers. Establish as needed meetings with individual members of the organization who need additional guidance in their officer or committee positions.
- Discuss concerns with officers in private and praise them in public.
- Meet with the officers and help them set goals. Encourage the Executive Board to disseminate reports (such as financial reports) to the general membership on a regular basis.
- Orient new officers and members to the history and purpose of the group and help them to build upon it. Help members look toward the future by developing long-term goals and communicating those plans to future members.
- Help to resolve intragroup conflict.
- Enjoy the impact you can have on the students’ development. Help to develop the leadership potential within the group.
Be visible and choose to attend group meetings and events. At the same time, know your limits. Establish an attendance schedule at organization meetings, which is mutually agreed upon by the advisor and the student organization.

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

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

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

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

Be available in emergency situations.

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

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

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

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

Encourage feedback and the evaluation process.

Plan and encourage attendance at leadership training.

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

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

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

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

Leadership Problems

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

Membership Problems

- Low attendance at meetings.
- Members have low satisfaction/morale, are bored or apathetic, don’t communicate well, or feel left out.
- Members compete for attention.
- An individual member’s goals differ from those of the organization.
- There exists a lack of trust among members.
- Programs fail.
- There is a lack of ideas.

Organizational Problems

- Meetings are disorganized.
- Meetings are too long.
- The organization suffers from financial problems.
- There is no continuity from one year to the next.
- The organization has no “plan of action”.

Inner-organization Problems

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

Advisor Problems

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

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

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

There are many benefits associated with becoming an advisor to a student organization, such as:

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

The mode of advising a student group will be largely determined by two factors: (1) the needs of the group and (2) the personality of the advisor. With a group not having experienced leadership, an advisor may need to be highly directive. As student leadership develops, the advisor may adopt a less directive mode with students handling greater responsibility. This condition will vary greatly among groups and also with a group over a period of time. The advisor should be perceptive to the different needs and expectations of the group in determining a specific mode of advising.

To insure an opportunity for input from the faculty advisor, some organizations reserve a few minutes at the close of their meetings for the advisor to speak. The advisor may or may not wish to make suggestions to the members and officers. The range of topics which would be relevant to such occasions is quite broad: a verbal pat-on-the-back, remarks of evaluation, inspirational comments, even a few pertinent jokes. The “Advisor’s Corner” provides an opportunity for closer contact with the group.
Advisor/Advisee Relationships

The relationship between an advisor and an advisee can be both rewarding and fun. It is important that the relationship be defined from its start, in order to clarify what the advisor and advisee hope to gain from each other. This setting up of mutual expectations will help to create an open atmosphere, will help to prevent misunderstandings between the advisor and advisee, will help the advisor and advisee to set realistic goals for themselves and for the program, and will help to maintain an effective relationship.

It is important to remember that an advisor is not there for the sole reason of providing advice and support; and advisor can be a very valuable resource. The advisee needs to utilize these skills when working with his/her committee and programs. It is important for the advisee to recognize the various roles that the advisor plays within the university system. These other roles may provide the advisee with additional information.

Some of the important roles an advisor might play should be clarified from time to time. The advisor/advisee relationship is an on-going process and sometimes requires different roles for different situations. Some of these roles to be clarified include the following:

When is my advisor...

- a problem solver?
- a decision maker?
- an analyzer of group process?

Once these questions are answered, your organization will be on its way to good cohesion and effective functioning!
Tips for Advisors to Increase Organizational Productivity

Know what the students expect of you as an Advisor.

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

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

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.

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.

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.

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

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

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

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

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.

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

Develop a style that balances active and passive group membership.

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

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

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

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

Challenge the group to grow and develop. Encourage independent thinking and decision-making.
Advising Styles and Skills:

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

**Advising Styles:**

**Directing:**

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

**Coaching:**

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

**Supporting:**

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

**Delegating:**

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

**Advising Skills:**

**Flexibility:**

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

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

**Contracting:**

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

One of the most frequently asked questions about advising student groups concerns the legal liability of the advisor. In general, the advisor has accepted a position of faculty advisor to a student group as part of the job. The advisor should probably not be held personally liable for mistakes as long as the organization is not engaged in an activity which is illegal and as long as there is no negligence involved in the performance of the advisor’s function. The use of “common sense is one’s best guide” to determine what needs to be done is appropriate in most situations. In the event that an activity is potentially dangerous, the participants will not usually be judged liable should a participant become injured. Alcohol is an issue about which all advisors should be aware. ETSU is a dry campus. However, student groups do sponsor parties off campus with alcohol. The legal liability of the “host” who serves alcohol in the State of Tennessee has not been fully determined by the courts. The judiciary in other states have held that the host (sponsoring group) of the party can be held liable for the actions of an individual at the party who drives while intoxicated. It is in everyone’s best interest for you to convey this information to the members of a student group considering such a party and to weigh the risks appropriately. Travel is another liability issue of concern to faculty advisors. Use of commercial transportation is the safest way to travel. If the students plan to use a university vehicle, you should know that the university vehicle must be driven by a graduate student employee, faculty, or staff member. Work study students are no longer allowed to drive university vehicles. If the students drive one of their cars or you take them in yours, insurance policies should be checked to be sure the policy will cover such use and to see if the amount of coverage is sufficient for the trip and number of passengers involved. Any precautions you would take in planning your family’s vacation, you should also take in helping the students plan their trip. The Student Organization Resource Center and Student Affairs staff are more than willing to assist you in questions regarding liability and student organization.

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

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

- Assess the capability of the group to manage risk.

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

- Develop a plan of action in reducing risk.

- Communicate with everyone involved (officers, members, advisors, participants, and facilities staff)
Budgeting

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

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

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

Vote to approve budget.

Managing the Budget

Once approved, adapted and prepared, it should be monitored closely.

Set and maintain a minimum cash balance.

Formulate procedures and policies needed to achieve objectives.

Keep an accurate log of financial transactions (income/expenses); maintain in a record book (check and balance records regularly.)

Set up internal controls designed for safeguards and accurate accounting data.

Control cost—allow only approved expenditures

Assess budget regularly

After the budget period has elapsed, determine the outcome of each expense and revenue. Make suggestions.
Fundraising

Many student organizations have big plans and excellent ideas for programs or services. However, few organizations have the finances to make these plans real. It is important for student organizations to have some kind of fund raising plans and to execute those fundraisers with the utmost professionalism, accountability, and legitimacy. Fund raising events can be a lot of fun for all involved. It is important to make the 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 fund raising is to be creative and to keep your goal in mind. Members of your organization will not get excited or interested in your 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.

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.
- Involve all segments of your group, not just the officers. People contribute to what they create. Get as many volunteers for your project as possible. Make sure they understand the cause and are willing to contribute their time and effort.
- Determine your market: college students, community, parents, etc.
- Know your overhead.
- Advertise wisely.
- Let everyone know your expectations in advance and update on progress. Using a goal poster is a great idea; make sure that poster is displayed prominently.
- Recognize everyone involved in the planning and implementation of the fund raising project.
- Reward those who achieve. Make certificates, ribbons, or other type of small rewards for everyone who volunteered for the project.
- Thank supporters. Give your big donors some kind of tangible reminder of how they contributed to a good cause. Create and maintain good will with these contributors, because they will tend to help in the future.
- Complete a written evaluation or report. Make sure you include:
  - Contact names, addresses, and phone numbers
• Time lines and important dates
• Suggestions of things to do differently
Officer Transition

One of the most important functions of an advisor is to assist in the transition from one set of organization officers to the next. As the stability of the organization, the advisor has seen changes, knows what works and can help maintain continuity. Investing time in a good officer transition early on will mean less time spent throughout the year in a direct role of teaching, instead be there when questions arise. 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. 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 agenda
- 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?
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. 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
- 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 members of the organization
- Keeps a record of activities of the organization
- Keeps and distributes minutes of meetings
- Creates and distributes agendas of meetings
- 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 activities
- Prepares and files any report required
- Handles all official correspondence
- Manages organization office space
- Collects organization mail from the advisor or wherever mail is received
- Represents organization at official functions
- Remains fair and impartial during organization decision making process
- Coordinates organization elections

Role of the Treasurer

Some Potential Responsibilities:

- Keeps all financial records of the organization
- Pays organization bills
- Collects organization dues
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

- Submits financial reports to the members
- Prepares an annual budget
- Prepares all budget requests for funds
- Familiar with accounting procedures/policies
- Advises members on financial matters (i.e. vendors, ticket selling procedures)
- Coordinates fund raising drive
- Represents organization at official functions
- Remains fair and impartial during organization decision making processes

Other possible positions: Parliamentarian, Activities Director, Recruitment/Retention Director, Academic Coordinator, Liaisons, Community Service Director, etc.
The following is a list of the policies and forms. Please visit the SORC website for an abbreviated listing: http://www.etsu.edu/students/sorc/policiesforms.aspx

Policies:
- Student Organization Web Pages
- Fundraising Policy
- TBR Policy for Student Organizations
- University Center Facility Policy

Event Advertising Forms:
- Communication Reservation
- Sidewalk Chalk Form
- Display Reservation Request

Alcohol Policies/Forms:
- Event with Alcohol Form
- Notification for Greek Events with Alcohol

Reservation Forms:
- Culp Center Reservation Form
- Cancel / Change Culp Request Form
- CPA reservation form

How to form a new student organization:
- New Organization Registration Packet

Collegiate Link Guide:
- CollegiateLink User Manual
Miscellaneous Forms:

- Computer Account Request Form
- Vendor Statement of Responsibility
- Release-Hold Harmless Agreement Form
- Emergency Contact Form
- IRS Non-profit SS-4 Instructions
- IRS Non-profit SS-4 Form

Information:

- Award/Recognition Opportunities
- Listing of all Student Organization Websites
- SORC Staff Directory

Media:

- East Tennessean Advertising Rates
- WETS-FM 89.5 Submit Events

Dining services/Catering:

- Catering Guides

Printing Requests:

- University Press
Handouts for Student Organizations & Advisors

Contents:

1. Advisor's Self-Evaluation Checklist
2. Advisor/Student Evaluation and Feedback Tool
3. The Role of Advisor Checklist
4. Advisor's Agreement Worksheet
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
   Comments: 
   5 4 3 2 1

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

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

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

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

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

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

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

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

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

Directions: The advisor and each officer should respond to the following items, then meet to compare answers and discuss any differences. For any items, which are determined not to be the responsibility of the advisor, it would be valuable to clarify which officer will assume that responsibility. For each statement, respond according to the following scale:

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

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

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

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