Student Organization Advisor Handbook

Revised August 2023

Student Involvement
SAM HOUSTON STATE UNIVERSITY

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Welcome to Student Involvement!

Thank you for serving as an advisor for a recognized student organization and welcome to the Department of Student Involvement!

Alexander Astin's Theory of Involvement (1984) summarizes that students learn more when they are involved in both the academic and social aspects of the collegiate experience. Student organization advisors help facilitate the intellectual, social and emotional growth of students by serving as mentors, mediators, and educators. Sam Houston State University requires each student organization to seek out a faculty or staff advisor to partner with their organization. The position is purely voluntary and is a role that goes above and beyond an employee's day-to-day responsibilities related to their on-campus professional position.

The fourth goal of The Higher Education Coordinating Board's 60x30TX plan highlights the development of marketable skills. Student organization involvement provides students with a learning laboratory to develop transferrable skills in communication, organization, group development, teamwork, etc. that can be marketed to future employers. Organization advisors are also a critical component to ensuring our student leaders are prepared for the workforce upon graduation.

The Department of Student Involvement oversees over 250 student-run organizations, and we have several services and resources to help you and your organization achieve success. Student Involvement also focuses on providing leadership development programs and experiences to assist students with growing their leadership skills. Lastly, our department provides outlets for students to engage in service learning through our community service initiatives.

We would like to encourage you to stop by Student Involvement to meet all the student and professional staff members. We are here to assist you and your organization, so please feel free to take advantage of both our services and resources.

If you have any questions, please reach out. We are located in the Lowman Student Center Suite 326. You can also drop us a quick email at getinvolved@shsu.edu or call us by phone at 936-294-3000.

Sincerely,

Dr. Meredith Conrey
Director of Student Involvement

Getting Started

Introduction

Membership in student organizations can be an especially enriching aspect of the collegiate experience. Students who join organizations have higher reported retention rates throughout their undergraduate tenure. Members also gain valuable leadership skills by working with other students who are all working toward a common goal.

The Student Organization Advisor Handbook is a resource designed for advisors to assist their student leaders in running the administrative aspects of their student organizations. The handbook should serve as a guide for organization services and programming opportunities offered at Sam Houston State University.

This handbook is offered to provide context regarding policies that student leaders, student organizations, and organization advisors are expected to follow. Abiding by these written policies can ensure that student organizations function effectively.

Keep in mind that this resource will not provide all of the answers, but it can definitely serve as a helpful tool. As updates to the Handbook are made, advisors will be notified of the changes.

Recognition

Why does my student group need to be recognized by the University?
Becoming a recognized student organization at Sam Houston State University is a terrific opportunity to serve the campus community, build skills within a group, and develop relationships in the process. If a student organization fails to seek recognition with the Department of Student Involvement for the academic year, the student organization must meet with the Department of Student Involvement to seek recognition. Although there are several responsibilities of being a recognized student organization, there are also several privileges afforded to only recognized groups.

Compliance with the recognition requirements allows each student organization to take advantage of the following services in the Department of Student Involvement:

- Listing in student organization directories
- Access to campus meeting facilities, such as the Lowman Student Center
- Eligibility to apply for funding from the Campus Life Development Fund and the Student Affairs Travel Fund through the Vice President for Student Affairs Office
- The opportunity to participate fully in campus activities and programs as a recognized student organization

- Access to consulting and design services in the Department of Student Involvement
- The opportunity to display posters announcing meetings and other activities
- The possibility of holding fundraising activities on campus
- Access to OrgLINK, the only way to get connected digitally and manage an organization's rosters and events at Sam Houston State University
- The opportunity to send program/event information and organization announcements to campus via OrgLINK.

What are the requirements for Recognition?

The requirements for Recognition are outlined in the Student Organization Policy. Once a student organization is recognized, they are expected to maintain recognition by completing the following on an annual basis:

- Complete annual registration via OrgLINK
- Complete annual training requirements set forth by the State of Texas and SHSU
- Keep the student organization page updated on OrgLINK throughout the year

The Student Organization Policy includes details about the timelines for these items, and it also includes information about the reactivation process for any student organizations that lose recognition or choose to go inactive.

Category or Type of Student Organization

In accordance with the organization's purpose and/or mission statement, the classification of your organization will be chosen and approved by the Department of Student Involvement. Descriptions are listed below.

Academic	Organizations focused on academic pursuits associated with a college at the university and/or a national organization
Advocacy	Organizations that advocate for a specific group or cause
Affinity & Community	Organizations that represent all active communities at SHSU
Club Sports	Organizations associated with Club Sports at SHSU
College of Osteopathic Medicine	Organizations associated with the College of Osteopathic Medicine
Fraternity & Sorority Life	Organizations associated with Fraternity & Sorority Life at SHSU at SHSU
Recreational	Organizations that include physical activity as the center of interest
Religion & Spirituality	Organizations that focus on the religious and spiritual aspects of life
Special Interest	Organizations created based on a special interest

Annual Organization Registration

The Department of Student Involvement requires that all student organizations register by August 1 on OrgLINK**.** If an organization neglects to register by this deadline, services will be suspended, and the organization will no longer be recognized by the Department of Student Involvement or Sam Houston State University.

Student organizations often change leadership and/or membership at various times throughout the year. Any time there is a change, student leaders are responsible for updating the organization's roster and contact information on OrgLINK.

Student Organizations Policies & Recommended Practices:

As an organization, are we expected to follow any guidelines or regulations?

Yes, all Sam Houston State University students must adhere to the Sam Houston State University Student Code of Conduct found on the Dean of Students' website and the Student Organization Policy found on the Student Involvement website.

Student Organization Policy

The Student Organization Policy includes all policies pertaining to recognized student organizations at SHSU. Student leaders and advisors must make themselves aware and familiar with these policies. The Student Organization Policy is located on the Student Involvement website.

The purpose of the policy is:
- To define and describe a recognized student organization.
- To outline the requirements for student organizations to be officially recognized by Sam. Houston State University.
- To establish the rights and responsibilities of students acting in an official organization capacity.
- To outline risk management and event planning expectations.
- To share additional policies and regulations governing student organization activities.
- To provide conduct and disciplinary procedures for recognized student organizations.

A few key sections for advisors include:
- Rights, Responsibilities, and Limitations of Recognized Student Organizations
  - Off-campus speakers must be approved by the Dean of Students' Office
  - Organizations must carry out activities following the organization's constitution, local, state, and federal laws, and university policies/procedures

- All students and advisors must be aware of the Texas Statute on Hazing and the responsibilities for reporting hazing activities
- Risk Management and Event Planning
  - Advisors are part of the approval process for student organization event submissions on OrgLINK
- Student Organization Finances
  - Advisors are not permitted to act as signers on student organization bank accounts
- Travel
  - If traveling and staying overnight, student organizations are required to complete and submit a Clery Act Travel Form with the University Police department
- SHSU Posting & Distribution of Printed Materials
  - Posting approval is required for student organizations
- Service Hour Submissions and approvals
  - Advisors can only serve as the verification contact if they are directly affiliated with the service hours/agency related to the submission
- Branding
  - Student organizations must respect university branding and seek approval for any t-shirt designs or other printed items

Please locate the Student Organization Policy on the Student Involvement website to review all policies in detail.

The Role of an Advisor

Are student organizations required to have an on-campus advisor?
Yes. All SHSU student organizations are required to have at least one on-campus advisor. The primary advisor must be employed full-time at Sam Houston State University. Graduate students who are not employed full-time by the University cannot serve as the primary advisor for an organization. The advisor is responsible for signing any University-affiliated paperwork but offers much more to organizations than a signature on important documents.

Are student organizations required to have an off-campus advisor?
Although organizations are not required by the University to have off-campus advisors, several organizations choose to and in some instances are required by a regional/national office to have one. As far as the University is concerned, the on-campus advisor is the primary advisor. If the organization has both an on- and off-campus Advisor, the primary (on-campus) advisor will be contacted with questions, concerns, or updates regarding the organization, and it is their responsibility to share the information with co-advisors.

I am considering stepping away from advising a student organization. What support is available to organizations in need of a new advisor?
The organization leaders should work together to identify a new advisor. The Department of Student Involvement offers organization consultations and can assist with this process. Please call (936) 294-3000 to request a meeting for advisor inquiries.

If issues arise between the student(s) and the advisor(s), who should be contacted?
If issues or concerns should arise, please contact the Department of Student Involvement.

Advisor Responsibilities
The Department of Student Involvement expects all student organization advisors to…
- Advise no more than three student organizations at one time.
- Be available for advice and consultation.
- Advise organizations about potential and perceived risks.
- Assist in the planning, coordination, and approval of events.
- Attend events and meetings, as agreed upon or required.
- Assist the student organization with the verification process for determining organization officer eligibility (i.e., student GPA and enrollment status).
- Be aware of and understand rules and policies as well as local, state, and federal laws that pertain to student organization activities and report any violations of rules, policies, and/or laws.
- Be aware of the organization's financial status and assist with financial decision-making (Advisors may not serve as signers on student organization bank accounts).
- Complete any training requirements assigned by university staff regarding serving as a student organization advisor.

Student Leader Expectations
When working with advisors, the Department of Student Involvement expects students to…
- Notify the advisor of all meetings both formal and informal.
- Discuss personal expectations of the advisor **with** the advisor.
- Send the advisor a copy of meeting minutes.
- Meet regularly with advisor(s) to discuss organizational matters and relay updates.
- Consult with the advisor before any changes occur in the structure or policies of the organization. Also, consult with them before executing any major projects. Please understand that advisors should have speaking privileges and play a critical role in all organization decision-making.
- Understand that the success or failure of organizations (and their projects) rests with the student organization and not the advisor.

- Periodically evaluate the advisor and give feedback on how they can better serve the organization's mission and members.

Advisor Expectations Checklist

Advisors should be involved, but not solely manage the organization. We strongly support that these are student-run organizations. Nevertheless, working closely with an advisor provides several benefits to both the student group and the advisor(s) involved.

The advisor and the officers of the organization should rank the following items from 1 – 5: with 1 being an essential duty of the advisor and 5 not being the advisor's duty. Meet to compare answers and discuss any differences. For items determined not to be the responsibility of the advisor, it is important to establish whose responsibility it will be.

Advisor Expectations Checklist

	Attend all general meetings.
	Attend all executive board meetings.
	Call meetings of the executive board when believed to be necessary.
	Explain University policy when relevant to the discussion.
	Explain University policy to the entire group once a year.
	Help the president or other officers prepare an agenda before each meeting.
	Speak up during discussion when the advisor thinks the group may make a poor decision.
	Remain quiet during the general meetings unless called upon.
	Exert influence with officers between meetings.
	Take an active part in formulating the goals of the group.
	Initiate ideas for discussion when the advisor believes they will be helpful to the group.
	Be "one of the group," except for voting and holding office.
	Attend all group activities, meetings, events, etc.
	Check the secretary's minutes before they are written in final form.
	Obtain copies of all official correspondence.
	Be a custodian of all group paraphernalia, records, etc. during the summer and between officer transitions.
	Keep the official files of the organization.

	Inform the group of infractions of their bylaws, codes, and standing rules.
	Make the group aware of its stated objectives when planning events.
	Be responsible for planning leadership skills workshops.
	Insist on an evaluation of each activity by those students responsible for the program planning.
	Take the initiative in developing teamwork and cooperation among the officers.
	Let the group succeed or fair on its own; do not interfere unless requested.
	Represent the group in any conflicts with members of the University staff.
	Be familiar with University resources and procedures that affect group activities.
	Recommend programs, speakers, etc.
	Take an active part in the orderly transition of responsibilities between old and new officers.
	Cancel activities when they have been poorly planned, will violate University rules, or are unsafe.

Finances and Budget
Encourage the organization's Treasurer to complete Treasurer Training each year via OrgLINK. You as the advisor can also complete this training, if desired.

Hazing
Sam Houston State University's stance on hazing is very clear; it is strictly prohibited. If you suspect your organization is involved in an alleged hazing incident, you can confidentially contact the Department of Student Involvement or the Dean of Students' Office. The SHSU Code of Conduct outlines the Texas Education Code's definition of hazing as well as the responsibilities of student organizations in regard to hazing. "Hazing" means any intentional, knowing, or reckless act, occurring on or off the campus of an educational institution, by one person alone or acting with others, directed against a student, that endangers the mental or physical health or safety of a student for the purpose of pledging, being initiated into, affiliating with, holding office in, or maintaining membership in an organization." Students must complete training annually regarding Hazing & Risk Management, and advisors also are required to complete training at least once during their tenure as an advisor.

Campus Security Authority
All student organization advisors are designated as Campus Security Authorities and must complete training through SHSU. This training will be assigned by Human Resources. As such, advisors are required to report criminal incidents to the University Police Department if they receive a report. Advisors must also submit a Clery Act Travel Form each time students return from organization-related travel.

Illegal Substance Use/Abuse

As an advisor, you may encounter allegations related to drugs and alcohol. If you suspect illegal substance use/abuse, you are required to report this information to either the Department of Student Involvement, the Dean of Students' Office, or University Police.

Alleged Violations of Law/Policy, Discipline, & Grievances

Alleged violations of law or policy must be reported to either the University Police (law), the Dean of Students' Office (SHSU Code of Conduct), or Student Involvement (Student Organization Policy). Second, an organization must follow disciplinary procedures within their constitution. If you have a question related to student discipline, please contact the Department of Student Involvement or you may access a Student Organization Conduct - Grievance Form on OrgLINK for review.

Student Concerns

As an advisor, you should be sensitive to student concerns, listen attentively, and know when and where to refer a student depending upon their concern. The SHSU Counseling Center is an important resource for referrals, as is the Students of Concern Form from the Dean of Students' office. If a student ever presents an immediate threat to themselves or others, contact the University Police Department.

Involvement in Social Activities

Advisors have different degrees of involvement in an organization's social programs. As a general rule, appearance at some organization socials over the course of a given year will benefit an advisor by providing them with a chance to get more acquainted with members outside of a formal organization setting.

Organizational Development

Advisor Skills and Important Information

Meet 1-on-1 with Executive Officers

Invest the time and energy into understanding others and their needs. When you spend one-on-one time with someone, you have a better understanding of how you should cater your communication to suit the needs of that person. Spending time together also helps you to comprehend points of reference for each other.

Listen effectively without judging

If you are in a group setting and you can tell by the expression on the faces of others around you that they are judging the sender of the message, you may be a part of the unaffected party. Listen for the feelings being associated with the issue as well as the content. If you can learn to

say what you mean, watch your language, and focus on being effective in your communication. Remember that as the advisor, group members will look to you for your expression. If you are focusing on the message at hand, others will, too.

Meet with your group informally
Develop a culture where people are comfortable expressing themselves and communicating openly. You set the tone for your surroundings, so create a comfortable and relaxed atmosphere where people are open to expressing themselves freely. Hostility grown in silence and unexpressed feelings get in the way of building closeness and in turn, will hinder your group from communicating effectively together.

Conflict Management

Unfortunately, conflicts and disagreements are a part of everyday life when working with people with varying perspectives. Since most students already consider personal conflict or issues to be quite stressful, organizational conflict is an even greater challenge. Those who typically have a low tolerance level for anxiety and stress often tend to leave an organization when conflict arises.

The ability to manage conflict is one of the most valuable leadership skills one can possess.

What is conflict resolution?
Conflict resolution is about teaching people new ways to work through and resolve disputes. In order to settle these disputes, you'll have to identify both the recognizable and underlying concerns of both sides. In a group setting, you should specifically aim for the following:

Both sides should win. Obviously, you want a win-win situation where both parties are satisfied with the end result. At the conclusion of your resolution, there should be mutual respect between both parties and they should agree to be continually working toward the goal of the resolution.

Using a Collaborative Win-Win Approach

- **Set ground rules.** Agree to work together. Agree that you won't judge each other. Agree to act as civilized individuals. Agree that each member will be able to state their opinion without interruption.

- **Listen actively.** Let each person describe their point of view without interruption. The point is to understand what a person wants and why they want it.

- **Find common interests.** Establish facts and issues that everyone can agree on and determine what is important to each person.

- **Brainstorm possible solutions to the problem.** List all options without judging them or feeling that they must be carried out. Try to think of solutions where everyone gains something.

- **Discuss each person's view of the proposed solutions.** Negotiate and try to reach a compromise that is acceptable to everyone involved.

- **Reach a common agreement.** Each person should state his or her interpretation of the agreement. Write the agreement down and check back with members at a later time to see how it is working.

What do I do if my members become angry during the resolution?
The first step is to understand anger itself. Anger is an emotional state that can range from mild irritation to intense fury and rage. Feelings of anger actually produce physical changes in the body such as increased heart rate, blood pressure, and adrenaline.

Anger is a normal human emotion. It can be caused by anything from a friend's annoying behavior to worries about personal problems.

When handled in a positive way, anger can help people stand up for themselves and fight unfairness. On the other hand, anger can lead to hostility and hurt feelings when not addressed positively.

When does anger become a problem?
Anger becomes a problem when it turns into a verbal or physical issue. During your resolution, members may become angry, and tempers may flare… but that's okay. As long as you encourage your members to adhere to the guidelines they set in the beginning, you should be fine. If you have to take a timeout to let feelings settle, do so! A short break can help.

Overall, conflict resolution is a quality idea and can prove to be highly beneficial when all members agree to actively participate and take the idea of resolution seriously. As the organization advisor, keep in mind that when conflict inevitably arises you need to maintain neutrality. All parties involved in a conflict want to have their voice heard and their concerns addressed. If you are unwilling or unable to do so, there are resources available to help. Please contact the Department of Student Involvement for referral to these resources.
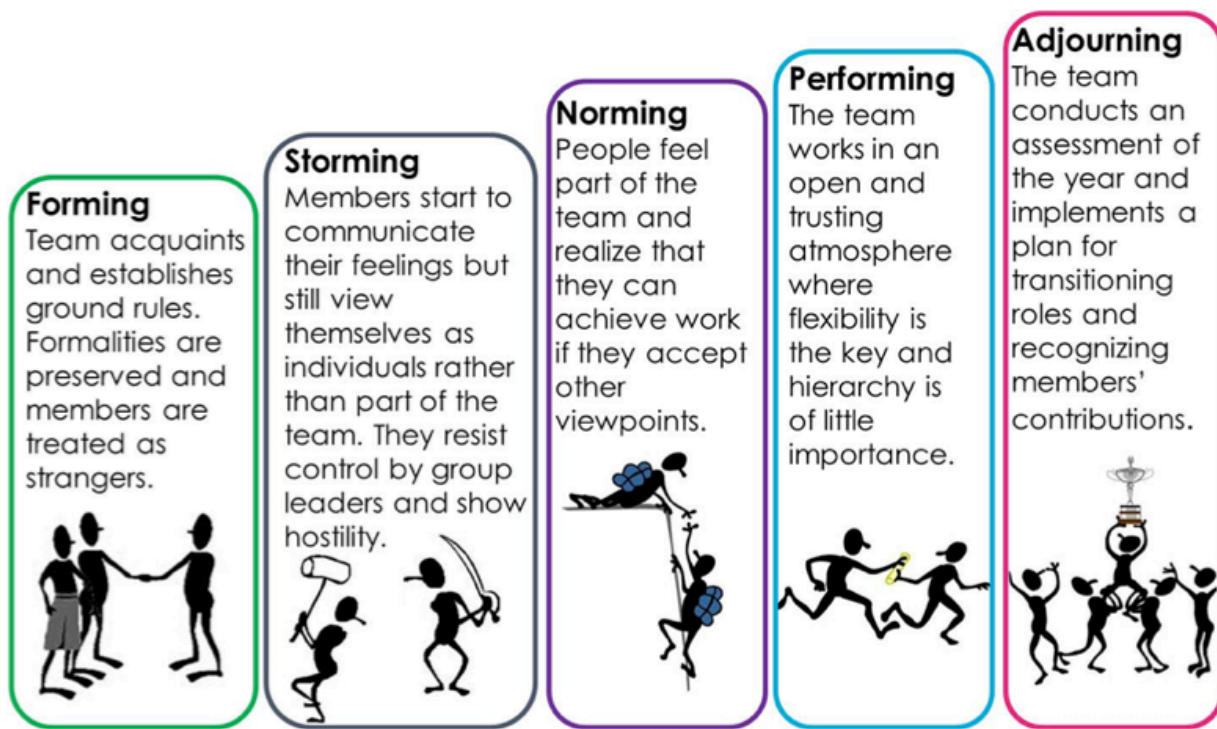
Goal Setting

Setting goals is important because it provides student organizations with direction. Goals can enhance the group's purpose for working together and contribute to the overall development of the group. Some groups benefit by having a highly structured goal-setting process, while others prefer a more informal process. Use the method that works best for you… but either way, write down your goals and make copies for your entire organization. When thinking about setting goals for the organization, think about setting SMART goals. That means that your goals should be Specific, Measurable, Attainable, Realistic, and Time-Bound.

The Five Stages of Group Development

There are five stages of group development and understanding each stage can help you to better support your student organization. This model is based on the research of Bruce Tuckman (1965).

Student leaders and advisors should learn to be sensitive to the needs of group members in the various stages of their development. Hopefully, by referring to this model, you'll be able to gain some insight into the stages that a group must pass through before attaining the benefits of stage four. This can also be an effective assessment tool to track the organization's progress in the future.

Forming
Team acquaints and establishes ground rules. Formalities are preserved and members are treated as strangers.

Storming
Members start to communicate their feelings but still view themselves as individuals rather than part of the team. They resist control by group leaders and show hostility.

Norming
People feel part of the team and realize that they can achieve work if they accept other viewpoints.

Performing
The team works in an open and trusting atmosphere where flexibility is the key and hierarchy is of little importance.

Adjourning
The team conducts an assessment of the year and implements a plan for transitioning roles and recognizing members' contributions.

Guiding Students through Officer Transitions

What exactly is officer transition?
The phrase "officer transition" or "leadership transition" refers to the process by which one organization leader is replaced by another. It is also with hope that the wealth of knowledge necessary for that leader to be successful in their new position is passed down as well. The Department of Student Involvement offers training online via OrgLINK for incoming/outgoing officers to cover important information and skills.

Outgoing leaders may have the tendency to simply pack up and go, leaving a box of files (or worse: nothing) and a confused future student leader gets left behind. However, what they fail to realize is that poor transitioning can ultimately hurt the organization. It is recommended that officers take Officer Transition Training at the <u>start</u> of their term in office, as the transition process should be something worked on throughout the year, versus only at the end.

The goal of having a successful officer transition is to maximize knowledge and details for a smooth transition. As an advisor, you can help facilitate the officer transition by serving as the bridge between the outgoing and incoming sets of officers. Help your organization stay on track by providing proper training and documents for incoming officers, and by having officers attend Officer Transition Training at the beginning of their officer term.

The Importance of Officer Transitions

- Transfers important organizational knowledge and information to new officers
- Maintains effective continuity of the group's progress, goals, and growth
- Provides a sense of accomplishment and closure for the outgoing officers
- Reinforces positive/productive communication between officers and between officers and group members
- Provides an opportunity for incoming officers to plan for the future and establish new goals
- Minimizes the loss of momentum the group has at the end of the year

The Year in Review
It is important during the transition phase that both the outgoing and incoming officers do a thorough review process of the past year. Here are some areas to focus on:

- Goals (met/not met, changes for next year)
- Programs/Activities (effectiveness, schedule balance, marketing, repeat or revamp)
- Membership (# of members, recruitment, involvement of members)

- Organizational Structure (clear roles/responsibilities/expectations, two-way communication)
- Organizational Operations (financial management, meeting effectiveness)
- Reputation (how members of the group or outsiders think of the group, enhancing reputation)

What to Transfer to Incoming Officers

- Student organization's history
- Yearly review
- Constitution or by-laws
  - Mission and purpose
  - Officer duties and responsibilities
- Calendar of important dates
  - Organization registration
  - Room reservations
  - Organization fairs
  - Organization events
- Meeting minutes
- Marketing materials and resources
- Current reservations and agreements
- Unfinished projects ▯ Organization goals
- Name and contact information of the outgoing officers
- Services for recognized student organizations
- Financial information
  - Budgets
  - Employer Identification Number (EIN)
  - Invoices and receipts
  - Bank account information, including debit cards and checkbooks
  - Outstanding bills or other fees

Other Important Information
- Student organizations MUST register on OrgLINK every academic year in order to be recognized as an official student organization at Sam Houston State University.
- One student representative from each student organization must attend the Student Organization Leadership Retreat (SOLR) prior to the start of the fall semester of every academic year.
- One student representative from each organization must complete Student Organization Required Training on OrgLINK before September 1.

Making the Transition

As previously stated, making the actual transition can be challenging, but preparation is the key to success. Below is a follow-up list of helpful tips to ease that transition for all parties.

- Elect new officers at least one month prior to the term which is set to take place. Creating an "overlap" period will allow time to train the new member who will be taking over responsibilities.

- During this overlap, outgoing officers need to ask themselves, "What do I wish someone had shared with me this time last year?" Then they need to share this information with incoming officers.

- Aside from reviewing things that worked well, it's also important to discuss why certain things didn't work for the organization. Review reports about failed past ideas and projects. What were the concerns about implementing those ideas?

Special Event Planning

What is considered a social event?

A social event is defined as any event or activity sponsored by any organization whose primary purpose is social or to provide entertainment to their members, alumni, University community, or other guests. All social events are categorized by event level/type.

Student Organization Policy on Social Events

Student organizations hosting social events must follow the requirements for the designated event in the Student Organization Policy.

LSC Policy

Policies governing the reservation of the Lowman Student Center and its spaces can be found on the Lowman Student Center website. For reservation of other buildings across campus, please refer to the Building Liaison Report found on the Facilities Management website.

Food Service Policies

Any food service on campus must be provided by ARAMARK. Any exception to the food service policy must be approved in advance by the Director of the LSC in consultation with the Classic Fare Catering director. Registered student organizations may provide and serve their own refreshments for their exclusive use during their meeting in small meeting rooms in the LSC. Refreshments may only be provided for the number of people less than or equal to the maximum room occupancy. The following is a list of the only items allowed as refreshments: coffee, tea, carbonated beverages, cookies, cake, donuts, chips, dips, popcorn, and fruit or

vegetable trays. Groups must turn in the Food Service Exemption Request form at least two (2) business days prior to their meeting and receive approval from the LSC

Office before bringing in the refreshments for their meeting. This form can be found on the Lowman Student Center website or you may visit the LSC office to request one. There are a few "free zones" where the ARAMARK policy does not apply. Please contact the Lowman Student Center office to request a list of these locations. For the complete catering policies, or to view the catering menu, contact 936-2941930 or visit the SHSU Catering website.

Visitor Parking Policy
For more information, contact Parking and Transportation at 936-294-1800 or visit their website.

Working with Outside Vendors
Student organizations may work with outside vendors; except for partnering with 3rd party promoters to host events on or off campus. If designing any items for printing (i.e., t-shirts, promotional items, etc.), please review the associated policies for printing and branding in the Student Organization Policy. Additionally, student organizations must ensure any agreed-upon obligations are met in a timely manner.

Financial Operations

Financial Planning

Student organizations are similar to a small businesses and should operate as such. A Treasurer doesn't have to be an accountant to keep track of their organization's income and expenditures. Maintaining a budget doesn't have to be a complex task. However, depending on the needs of the organization, the history of the budget transactions could require more than other student organizations. The officers should always keep copies of old budgets and use them as resource guides when working with a new budget and organization treasurer.

If a student organization handles money at all, they must obtain a bank account at a bank of their choosing. Advisors are not to be signers on the account, according to SHSU University Audit.

It is strongly recommended that the President, Treasurer, and Adivsor meet regularly to review the organization's finances. Additional information regarding student organization banking can be found in the Student Organization Policy and in Treasurer Training offered via OrgLINK under the forms tab.

Is setting up an account a service offered by the University?
No. At this time, the University does not offer checking accounts for student organizations. However, there are a few banking institutions in town that do so. Student organizations can use any bank of their choosing.

Can a member's personal account be used for our student organization funds?
No, an individual member's personal bank account may not be used for student organization funds. The business records for the organization must be maintained in the organization's name and not in the name of an officer, member, or advisor. It is important to avoid confusion with respect to whom the funds belong and avoid tax liability for an individual. Also, keep in mind that financial institutions will require that checks made payable to the organization be deposited into an account established for the organization. The Department of Student Involvement does not manage accounts for student organizations.

<u>**Bank Signature Authority**</u>

Can an organization have two-signature checks?
Yes, it is highly recommended. Two-signature checks are a good idea to help prevent fraud or one person spending funds on non-approved expenditures. A minimum of two officers need to serve as signers on a student organization's bank account; however, it is often easier to have more than two for transition processes.

Can an advisor be listed as a signer on a student organization's bank account?
SHSU's Office of Internal Audit does <u>not</u> recommend that advisors serve as signers on a student organization bank account, <u>nor</u> handle organization funds. They do recommend that advisors regularly meet with the organization president and treasurer to ensure the accuracy of financial records for good banking and financial practices.

Do we need to let the financial institution know if the authorized signers have changed?
Yes. It is imperative to keep the authorized signers current at the financial institution. Plan ahead for officer transition and the transition of signers on bank accounts.

Usually, student organizations cannot change the designated signers without notifying the financial institution, in writing, of the change. If you don't change the designations at the financial institution and the new signers try to transact business, then the financial institution can refuse to complete the transaction. Signers personally assume all liability for the account.

Contact the organization's financial institution to find out how they process a change of signers. Each financial institution handles this process slightly differently, but most require that at least one of the previous signers authorize the change. An organization may want to designate one

current authorized signer to be responsible for handling any change of signers when new signers take over the account.

Are there banking services that our student organization should NOT take advantage of?
Talk with your banking/financial representative to work out the details of your bank account. It is advisable that all banking transactions are handled through checks and deposit slips so there is a written record of all transactions to minimize any risk of misuse of student organization funds.

Does the University provide funding for our student organization?
Yes, to a certain degree. There are multiple means available to fund or assist in funding your student organization.

- **Student Affairs Travel Fund.** This method of funding provided by the Vice President for Student Affairs is for student organizations that are traveling off campus. The purpose of this funding source is to provide financial assistance to student organizations that seek to bring recognition to Sam Houston State University via participation in local, regional, state, national, and international student events, conferences, competitions, etc. Refer to the VPSA website to apply for the Student Affairs Travel Fund.

- **Campus Life Development Fund (CLDF).** The purpose of this source is to provide funding for campus life programming. This fund allows an avenue for student organizations to apply for funding support year-round. Refer to the VPSA website to learn more about and apply for the CLDF.

- **Co-sponsoring Programs.** Co-sponsoring programs is oftentimes overlooked yet a great resource for funding. On campus, check with various departments and see if they express an interest in co-sponsoring your event. Off-campus, check with local businesses and see what they can offer. Co-sponsoring doesn't always include a monetary donation, it can also be the donation of goods or free services, and possibly free publicity.

Before approaching your possible funding source, research the benefits of what a third party would gain from assisting you with your program. Also, provide them with various methods for co-sponsorship aside from monetary donations.

Resources

OrgLINK
https://www.shsu.edu/orglink

SHSU Student Organization Policy
https://www.shsu.edu/dept/student-involvement/forms/FY24+Student+Organization+Policy.pdf?language_id=1

SHSU Student Code of Conduct
https://www.shsu.edu/dept/dean-of-students/student-code-of-conduct.html

Contact: Department of Student Involvement

936-294-3000
getinvolved@shsu.edu
www.shsu.edu/getinvolved

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