

# Advisors Manual

**Office of Student Activities**  
**University of St. Thomas**



UNIVERSITY  
*of* ST. THOMAS

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September 2012

Dear Club Advisor:

On behalf of the Department of Campus Life, specifically, the Office of Student Activities, I would like to thank you for your involvement with your student organization. Without you, our student groups would not have the proper guidance and support needed to make them successful. You play a key role in the development of our student leaders as they participate in their co-curricular activities. Please know that I greatly appreciate the time and talent that you offer to our students.

This manual is meant to be a reference tool for you. There is information on a number of topics that I hope you will find useful. There is an “Advisor Role” worksheet that I encourage you to complete with the executive board of your organization. This will help define what your role is with the group. It may be helpful to complete the exercise in the fall and review it again in the spring as some of the items may change over the course of the year. There is also an Advisor Checklist which you should find helpful. Finally, there are some additional activities that I believe may help you in developing your advising style and assisting your chosen organization.

Feel free to contact me; I am available to assist in your development as an advisor as well as to serve as a resource if needed. Developing an Advisor relationship with the leadership and members of the organization(s) you advise may not be easy, especially with the constant change in student leadership but please know that I will do what I can to support you. If you are seeking further information on organizations, programming or the budget process that you must adhere to, you should refer to the Organization Manual.

Please don't hesitate to contact me in the Office of Student Activities if I can be of any assistance. My extension is X3572 and my email is [montela@stthom.edu](mailto:montela@stthom.edu). I, along with Matt Prasifka, Assistant Vice President of Campus Life, will work to address any questions or concerns you may have. I am looking to implement new ideas as well as seek out additional ideas from others so please do not hesitate to share your thoughts in reference to club or organization(s) or your Advising responsibilities.

There are several new guidelines this year and we'll be reviewing these guidelines during the Annual Leadership Summit on Friday, September 7 in Scanlan. Your attendance at this event is greatly appreciated. The risk management information will be discussed over dinner from 5:00 PM – 7:00 PM. Immediately prior to this session, I will facilitate a break-out session for Advisors so I hope that you'll arrive for that meeting. Students will be required to attend the summit from 3:00 PM-8:00 PM. If you have any questions, let me know.

*Thank you in advance for a job well done!*

*Sincerely,*

*Angie Castro Montelongo  
Director of Student Activities*

## WHAT'S THIS THING CALLED ADVISING?

As advisors of student organizations, it would be helpful for us to understand why students join a particular organization and what motivates them to put the kind of time into the group that they do.

Some would categorize involved students in the following ways:

*Die-Hards:* These students are interested in the organization because of the goals it was founded on. They want to keep the group going no matter what because they believe in the organization.

*Seekers:* These students are looking for a place to belong, a niche they can carve for themselves. Looking to direct their energies where they can meet people and develop new friendships.

*Friends:* These are students that have watched others in the group and have seen the positive experience firsthand so they want to get involved with the organization (usually recruited by someone already involved in the group).

*Ego Trippers:* These students have become involved in the organization to have control and want to be where the action is or they want the prestige that comes with being associated with that particular organization.

*Resume Builders:* These students are the ones that carefully plan the organizations they get involved with which will offer the best marketable experiences for their future.

*Late Bloomers:* These are the juniors and seniors that have finally realized that there is more to college than their academics. They tend to be energetic and willing to become involved in as much as possible before they graduate.

All of these categories of students make a positive contribution to the group, but we as advisors must remember that a person will stay involved in the organization only for as long as it meets their needs. If their needs are not being met then either their level of participation and enthusiasm will drop dramatically or they will drop out of the organization all together. As an advisor, it will help you to have an understanding of why individuals are in the group and what are they expecting from their involvement.

### Advisor Tips to Remember:

Credibility is essential for an advisor. Students must trust your judgment or you will not be effective regardless of the authority you have. Be careful determining your guidelines and expectations while also respecting the boundaries you set for yourself. Remember, you are trying to get students to make decisions and initiate action.

## Eight Diverse Roles of Organization Advisors

Following are eight roles that organization advisors may be asked to fulfill. Each one has benefits as well as drawbacks. In certain situations you may find yourself playing one role and in other situations a different role. It is important to know the different roles and when it is appropriate to use each role. It is also important to speak with your students about the roles they expect you to fill.

- MENTORING*** Listens; asks questions, reflects back feeling and informational responses; represents information; gives assurances and support.
- MANAGING*** Sets goals and performance standards; establishes communication channels; provides evaluation of progress; administers and implements the policies of supervisors.
- LEADING*** Employs authority to accomplish goals through cooperation of group; maintains group harmony; solves problems by invoking symbols of the position authority.
- NEGOTIATING*** Defends position with clear, coherent rationale; reconciles opposing viewpoints; discusses possible solutions; states and argues position; bargains over terms.
- SUPERVISING*** Assigns tasks; assess individual competence to perform a given task; explains operating procedures; evaluates performance.
- INSTRUCTING*** Conducts seminars and workshops; illustrates theories and principles through explanation and example; points out similarities and differences of viewpoints; uses demonstration and role playing techniques to teach subject matter.
- CONSULTING*** Gives information and ideas based on experience and training; gives ideas to define and clarify procedures and expectations; recommends alternative courses of action; makes suggestions to reduce resistance and sharpen understanding of program goals.
- PERSUADING*** Describes and explains advantages and benefits of a training activity or program; influences in favor of certain view; speaks and converses with individuals, groups, other departments and organizations; gives instruction, advice, personal assistance.

On the following pages you will find a “Role of the Advisor” exercise. I encourage you to take the time to complete it with the executive board of your organization(s). It will benefit both parties to have the advisor role clarified.

### The Role of the Advisor

Listed below are some expectations student leaders have of their advisor. This form is designed to help advisors and student officers arrive at a clear and mutually agreed upon role of the advisor in student organization affairs.

**Directions:** The advisor and each officer should respond to the following items, and meet to compare answers and “iron out” any differences. For items that are determined not to be the responsibility of the advisor, it would be valuable to clarify which officer will assume the responsibility.

*For each of the following statements respond on a scale of 1-3 how important this function is:*

1. *Essential for the advisor to do*
2. *Helpful for the advisor to do*
3. *Absolutely not the advisor’s role*

### The Advisor Is Expected To:

- \_\_\_ 1. Attend all general meetings.
- \_\_\_ 2. Attend all executive board meetings.
- \_\_\_ 3. Explain University policy when relevant to the discussion
- \_\_\_ 4. Reserve an appointment with the President (Chairperson) before each meeting.
- \_\_\_ 5. Help the President prepare the agenda before each meeting.
- \_\_\_ 6. Serve as parliamentarian for the group.
- \_\_\_ 7. Speak up during discussion when s/he has relevant information.
- \_\_\_ 8. Speak up during discussion when you believe the group is making a poor decision.
- \_\_\_ 9. Be quiet during general meeting unless called upon.
- \_\_\_ 10. Exert his/her influence with officers between meetings.
- \_\_\_ 11. Take an active part in formulating the goals of the group.
- \_\_\_ 12. Initiate ideas for discussion when s/he believes they will help the group.
- \_\_\_ 13. Be one of the group except for voting and holding office.
- \_\_\_ 14. Attend all group activities.

- \_\_\_15. Require the treasurer to clear all expenditures with him/her before financial commitments are made and review the treasurer's book monthly.
- \_\_\_16. Check all official correspondence before it is sent.
- \_\_\_17. Get a carbon copy of all official correspondence.
- \_\_\_18. Be custodian of all group paraphernalia, records, etc. during the summer and between change-over of the officers.
- \_\_\_19. Inform the group of infractions of their bylaws, codes standing rules, and constitution.
- \_\_\_20. Keep the group aware of its stated objectives when planning events.
- \_\_\_21. Veto a decision when it violates a stated objective, the bylaws, codes, standing rules, constitution or University policy.
- \_\_\_22. Mediate interpersonal conflicts that arise.
- \_\_\_23. Let the group work out its problems including making mistakes and "doing it the hard way".
- \_\_\_24. Take the initiative in creating teamwork and cooperation among the officers' group.
- \_\_\_25. Represent the group in any conflicts with members of the University staff.
- \_\_\_26. Be familiar with the University facilities, services, and procedures which affect group activities.
- \_\_\_27. Recommend programs, speakers, etc.
- \_\_\_28. Take an active part in the orderly transition of responsibilities between old and new officers at the end of the year.

## Club Identity

This section will assist you in helping your organization develop a positive image both on and off campus. It is important for everyone to know and understand the organization's mission. Encourage your students to review their mission often, particularly as they plan programs or other activities throughout the year.

### Creating a Positive Image

Your club identity defines who and what your club is, and why it exists. It is kind of like your mission statement or purpose. Having a positive identity can allow more opportunities for your club to grow and develop. For example, having a positive image on campus can increase your membership. Or, having a positive image within the community can allow more club growth in the form of networking, mentoring, or funding opportunities. A company, organization, and/or individual will be more apt to donate time, money, and/or resources if the recipient of their generosity has a good reputation.

### Who is your club?

Who are your members?

Are there any commonalities among your members?

How diverse is your group?

### What is your club all about?

If you had to give a one-sentence description of your club, what would it be?

What is your mission?

How do you accomplish your mission?

List three examples of your club's activities last year or what you hope to do this year.

### Why does your club exist?

What can people learn from your activities or programs?

What do they do at your programs?

In the space below, compile all this information into three or four sentences.

*This is your club's mission and purpose.*

*It is a good idea to share this mission with all your members as you begin the new year.*

Having a **mission statement** for your organization will allow you to recruit more members, give members a better idea of the club's purpose so they can contribute more to the organization, and solicit donations from outside sources.

There are a variety of ways you can portray a positive image:

1. Create an organization brochure.  
A brochure highlighting your organization is an effective way of promoting your club to new members and networking opportunities. Draw attention to your mission statement by bolding, italicizing, or underlining the statement.
2. Member T-shirts.  
Get each of your members a T-shirt that has your club name on it and a graphic that is eye-catching. Require your members to wear their shirt at each event sponsored by the club. You can also require them to wear this at least once a week, consider it advertisement for your club.
3. Professionalism.  
Remember that a lot of the people you come in contact with as a representative of your club are professionals. Thus, they expect and appreciate a certain level of professionalism. With written correspondence, ask your Club Advisor or the Director of Student Activities to review your letter. Or bring it by the Writing Center for someone to check it for you. When meeting with professionals or giving a presentation, dress appropriately... and definitely arrive on time. Employers will remember this when it comes time for you to interview for a co-op or permanent position.
4. Co-sponsorship.  
Whenever possible, get your club's name out there. Volunteer your club to help with other campus events, such as Open Houses, Orientation, or Family Weekend.
5. Stay focused and organized!  
It is important for you to constantly look at your club activities and mission statement. If one does not complement the other, review your mission and the activities you are coordinating. If your events are not in correlation to your mission, brainstorm ideas for other programs. Or, consider revising your mission to reflect your membership and its ideas. What may have worked as a mission statement twenty years ago, or even last year, may not work now. Choose an Executive Board Member, such as the Vice-President, to work with the mission statement. Or create a committee, and ask the Vice-President to chair the committee.

## Minimum Expectations of Advisors

Our hope in the Office of Student Activities is that you will be as involved with your group as possible. It is up to you and your students in the organization to determine your specific role but we'd like to see the following occur with each advisor:

1. Advisor should have knowledge of all financial matters (expenditures, budgeted vs. actual amounts, etc.); we suggest meeting with your treasurer on a regular basis and auditing the books yourself to insure that bills are being paid in a timely manner and that money is being returned to the group as quickly as possible.
2. Advisors will sign off on all financial documents (see financial procedures in the addendum section of this manual)
3. Advisor should be familiar with the group's constitution and mission statement
4. Advisor should be aware of any programs sponsored by the group, particularly if alcohol is being served. The very detailed alcohol policy is found on pages 27-30 in this manual. It is critical to be familiar with this policy if your group will plan events with alcohol.
5. Advisor should provide a historical perspective for the group (i.e. if all student leadership suddenly departed, it would be the Advisor who could recruit members and still have a viable organization)

## UST Alphabet

We use many acronyms on campus, particularly within Student Affairs and Student Activities so here is a quick explanation of the most popular ones:

COC:	Council of Clubs (the parent organization to most groups on campus)
SAB:	Student Activities Board (campus programming organization)
SGA:	Student Government Association (UST student governance)
VPSA:	Vice President of Student Affairs (Patricia McKinley)
SOC:	Student Organization Committee

## Yearly Reactivation Responsibilities

There are yearly responsibilities that your organization must complete to ensure they maintain active club status. Following is a list of those responsibilities. Please take the time to remind your executive board members of the responsibilities and make sure that they are completed on time.

After elections for the next academic year, near the end of the spring semester, organizations will be asked to complete the reactivation process outlined below. This process ensures that your organization had completed all necessary paperwork for the current academic year and is registered for the next academic year.

### A. Reactivation Responsibilities

1. Meet with your treasurer to ensure that all organization bills have been paid and that your account balance is correct. This will help to ensure that your rollover for the following year is correct.
2. Complete COC paperwork for outstanding allocations or loans from COC.
3. Complete an Organizational Record form. This information will be used to create a Leadership Directory that will be available at the start of the fall semester. The form will be available in your Organization Mailbox, at the COC meetings or in the Office of Student Activities.
4. At the end of each semester each organization is responsible for completing an End of Semester Report. This is a brief form that will outline the activities and highlights of the previous semester. The form will be available in your Organization Mailbox, at the COC meetings or in the Office of Student Activities.
5. Review your constitution and make any necessary updates or corrections. Be sure to give the Office of Student Activities a copy of the updated constitution for your organization's file. (See Writing and Updating Your Constitution in the Organization Manual)

The following information should be turned in to the Office of Student Activities no later than April 30.

1. A completed Organizational Record with Advisor's signature
2. A completed End of the Semester Report
3. A copy of your organization's updated Constitution

### Things to Consider...(share with student leaders)

1. I actively listen to others whose ideas and opinions differ from my own.
2. I can usually see two or more sides of any issue.
3. I sincerely do not want to offend or insult others.
4. If I were at a party with people who were different from me, I would go out of my way to meet and talk with them.
5. I am open to new ideas and usually realize that “my way” is not the “only way.”
6. I do not need to know or understand everything that is going on around me.
7. I can tolerate ambiguity.
8. I have made mistakes and have learned from them.
9. I frequently assess my skills, strengths and weaknesses, and deliberately work to improve myself.
10. I am always curious about things I do not understand, and ask questions and read in an effort to learn more.
11. I know that I am a product of socialization and that I have absorbed a lot of stereotypes and biases along the way.
12. I have friends/co-workers who are different from me in age, gender, ethnicity, economic status, physical abilities, sexual orientation, and education, etc.
13. I can easily adapt to changes and new situations.
14. I am flexible and patient with people at work.
15. I am aware of my biases and prejudices and deliberately try to control my assumptions about others.
16. I find that I often am “reading” people and groups trying to assess what is happening and why.
17. In new and unfamiliar situations, I tend to sit back, watch and listen before acting.
18. I am sensitive to the feelings of others and watch how they react to me when I am talking.

## Additional icebreakers and teambuilders

### Goal setting:

**Materials needed:** newsprint and markers or individual sheets and pens or markers

It's always helpful to have your student leaders think about their goals and what they would like to accomplish during the year. You can do this by having each exec think about what they would like to do in their position as well as think about what they would like to achieve as an executive team. You can guide a brainstorming session that focuses on programs, financial goals, and other areas so that each exec sees the big picture as well as where they fit into that big picture. Have them also think about the goals they would like to have for their members (i.e. recruiting a certain number this year, having a certain number of members take the lead with various programs, etc.). After the goals are agreed upon, ask the secretary to type the goals into one document and give a copy to each exec. You can post the goals in a visible place if the execs meet in a common space (your office, their office, etc.). The more often they refer to their goals, the more likely it is that they are remaining true to their mission and to their purpose.

### Setting expectations:

**Materials needed:** newsprint (or bulletin board paper) and markers or individual sheets and pens or markers

This is similar to the goal setting exercise except that you are setting expectations for the exec team and they are setting expectations of themselves as well as you, the Advisor. If you have already discussed the "Role of the Advisor" exercise, the expectations of you will be fairly easy to finalize. If you have not used the "role" yet, please refer to it during the expectations exercise. Again, have your student leaders work individually at first-ask them what they bring to a team and have them list that on a sheet of paper. Go ahead and discuss that piece before moving into the specific expectations. Next, ask them to write down what they expect of themselves in this role as an exec. Lastly, ask them to write down what they expect of others on the team (i.e. support, patience, strong work ethic, etc.). This last item should go on a large sheet so that everyone can see the expectations and discuss them. Once the expectations are agreed upon, ask the secretary to type the goals into one document and give a copy to each exec. This will help you when you have execs who are not meeting expectations since you'll be able to refer back to this document and hold them accountable for their actions.

### Drawing the "Ideal" exec (and advisor):

**Materials needed:** blank sheets of paper with an outline of a person or just blank sheets that students can draw their own person

Ask each exec to draw their "ideal" exec and advisor. Some examples of good things to include: ears for listening, a heart for caring, eyeglasses for perspective, etc. As you can tell, the list can go on and on. This is a fun way for execs to discuss expectations and it will give you an idea of their creativity and comfort levels.

### Team Identity Worksheet:

**Materials needed:** The following questions...

This exercise will help your group members think about their team experience. You can utilize this instead of the expectations or in addition to that exercise.

**Instructions:** Complete the following statements individually.

1. My definition of team is:
2. My personal needs as they relate to being a member of this team are:
3. My perceptions of the needs that we share as members of this team are:
4. The primary purpose for this team's existence is:
5. Our task as a team is to:
6. My contributions to this team will be:

### General Icebreaker:

**Materials needed:** Only the following questions...

These questions are great icebreakers and touch upon a variety of items so it's easy for execs to start talking about them and then the conversation usually continues without too many more questions. Feel free to add to this list:

1. If you could have dinner with any three people, who would they be?
2. One thing I want to accomplish this semester is...
3. The traits I look for in friendship...
4. The things I want to improve in myself...
5. Three adjective which best describe me are...
6. The features of my personality that I like most...
7. What my family means to me...
8. My favorite color is...
9. The happiest time of my life was when...
10. My most embarrassing moment was when...
11. What's your pet peeve?
12. If you could change one thing in your life, what would it be?
13. What was the most challenging thing you've ever had to do?
14. Who has been the most influential person in your life? Why?
15. Who is your favorite person to be with?
16. What is your favorite class?
17. What is your favorite movie role and why?
18. How do you relax?
19. What makes you nervous?
20. My greatest strength is...
21. What would you wish for is you were given three wishes (and no wishing for more wishes!)?
22. To me, leadership means...
23. Heroes I identify with...

**Human Scavenger Hunt (good for use at a general meeting):**

**Materials needed:** The following questions on a sheet of paper for each person

Instructions: Identify someone in the group with the characteristics that fulfill the statement and ask them to sign their name on the line next to the statement. You may not use one individual for more than two items.

1. Someone who has blue eyes \_\_\_\_\_
2. Someone who attended a wedding this summer \_\_\_\_\_
3. Someone with an allergy \_\_\_\_\_
4. Someone who is wearing sneakers \_\_\_\_\_
5. Someone who was not born in Texas \_\_\_\_\_
6. Someone who is wearing contact lenses \_\_\_\_\_
7. Someone who subscribes to "Time" magazine \_\_\_\_\_
8. Someone who loves baseball \_\_\_\_\_
9. Someone who hates football \_\_\_\_\_
10. Someone who is wearing flip flops \_\_\_\_\_
11. Someone who plays racquetball \_\_\_\_\_
12. Someone whose birthday is in September \_\_\_\_\_
13. Someone who watches reality TV \_\_\_\_\_

**My personal shield:**

**Materials needed:** The following questions on a sheet of paper with a shield on it

Have each person fill out each section of the shield and then share with the group. For a variation on this idea, change the categories to fit your topic of discussion.

What is your greatest talent/strength?

What is your greatest weakness or area of improvement?

Identify your greatest possession

Identify your greatest achievement

Where will you be in one year?

Where will you be in five years?

**The Map Game (good for general meeting):**

**Materials needed:** None

This is a really easy game...just use the room where you are and turn that into a map of the United States. Have students answer the following questions and then add some of your own: Where were you born? What's been the best vacation spot? Where would you love to travel? The idea is for students to move around the room "geographically" as they answer the questions. Have fun!

## Group Development Information- Tuckman's Model

The stages of Tuckman's Model of Group Development are:

Forming (orientation, testing, dependence)

Storming (conflict, emotionality, resistance to influence and task requirements)

Norming (in-group feelings and cohesiveness develops, new standards evolve, new roles are adopted)

Performing (functional instrument for dealing with the task and present reality)

Adjourning (final resolution, departure)

Key behaviors or actions you might see in each stage from students:

Forming: information meetings, recruiting, advertising, icebreakers...

Storming: constitution, mission statements, power struggles, cliques develop, learning curve, rebelling against advisor, members leaving...

Norming: value systems in place, officers in place, excited, social group activities, group identity develops, evolution of shared vision...

Performing: overwhelmed, completion of tasks, routine develops, solving problems...

Adjourning: evaluation, assessment, recognition, traditions, transition and orientation of new leaders...

Key behaviors or actions you might see in each stage from advisors:

Forming: available, assist with orientation, facilitate icebreakers, teambuilding exercises, serve as a resource person...

Storming: help facilitate this process, problem solver, introduce conflict resolution skills, assist the group in maintaining cohesiveness...

Norming: motivator, recognizing, help identify the natural leaders to assist the officers, revisit mission, goals, resume focus, make changes as needed...

Performing: supportive, applaud team for work, assess plan, have fun, integrate new ideas, make adjustments, provide feedback...

Adjourning: job well done, evaluate, assess and give feedback, provide recognition, be there for the graduating students by helping them bring closure to this part of their lives, be prepared to deal with new and former execs who will be in different stages...

## Ways to give recognition to volunteers

Smile	Keep challenging them
Treat them to a coke	Take time to explain fully
Send birthday cards	Be verbal
Recognize personal needs and problems	Respect sensitivities
Enable them to grow on the job	Be pleasant
Respect their wishes	Honor their preferences
Give informal get togethers	Create pleasant surroundings
Greet them and say their name as you see them	Welcome them to socials
Award plaques and other recognition items	Take time to talk
Enable them to grow out of the job	Make good plans
Send Valentines	Write them thank you notes
Send good luck cards/emails for finals	Provide good training
Surprise them with candy or treats at a meeting	Be a real person
Provide useful tools	Accept their individuality
Allow for evaluation and assessment	Thank them in the Cauldron
Promote a "volunteer of the month" program	Send Christmas cards
Be familiar with details of the group	Attend a sports event together
Don't waste their time-be prepared at the meeting	Value them and their work

## Hints on Motivating People

Motivation is a personal feeling. It is an attitude based on personal needs, goals and rewards. Think of it in terms of what motivates you. Chances are you are motivated to do things that meet your personal needs, or to achieve a personal or organizational goal that is important to you.

*So, how can you motivate others?*

Just because motivation is largely a personal feeling or attitude does not mean that nothing can be done to motivate others.

1. Set goals and objectives; everyone needs something to work toward. The key here is setting concrete goals with specific behavioral objectives-and give people the opportunity to help create them. Remember, "people support what they help create".
2. Set clear and realistic standards and expectations; people need to know exactly what is expected and the standard or level of performance at which they are to work.
3. Rewards are important; whether it's a verbal reward, a gift or monetary reward, people tend to work harder when some reward is imminent.
4. Give attention to work and follow up to make sure work is getting done. Be careful not to leave the impression that you don't trust someone to do it-but your interest in the work will increase his or her interest in it.

5. Use the words “I need you”. It is a very simple concept: people who feel needed act needed and perform. Don’t use “I need you” unless you mean it; insincerity will breed apathy and distrust. Do need people for their energy, skills, talents or time.
6. Be a good role model; others will follow your example. Model the behavior standards and expectations you set for others.
7. Be enthusiastic and excited about activities; also, make sure the group is excited and involved in the planning of those activities;
8. Study members and determine what makes each one tick (one easy way to do this is to just ask). People are motivated by different things...some people may be motivated by having responsibility and nurturing people (care-giver); others may be motivated by having fun or being the center of attention; still others are motivated by the position itself or enjoy working with the big picture; others are motivated by having control in a position or having structure and rules and regulations; others may be motivated by their own independence. Connecting with the various types can be challenging but for an Advisor, it is very rewarding.

**Additional Motivation Hints:**

- |                                                                                          |                             |
|------------------------------------------------------------------------------------------|-----------------------------|
| Be a good listener                                                                       | Praise in public            |
| Criticize or reprove constructively and privately                                        | Be considerate              |
| Delegate responsibility for details                                                      | Give credit where it is due |
| Avoid domination or “forcefulness”                                                       |                             |
| Show interest in and appreciation of others                                              |                             |
| Make your wishes known by suggestions or requests and state your reasons for it          |                             |
| Let members in on your plans and programs                                                |                             |
| Never forget that the leader sets the styles for the members                             |                             |
| Play up the positive                                                                     | Be consistent               |
| Show members you have confidence in them and expect them to do their best                |                             |
| Ask members for their counsel and help                                                   |                             |
| When you are wrong or make a mistake, admit it                                           |                             |
| Give courteous hearing to ideas from members                                             |                             |
| If an idea is adopted, tell the originator why                                           |                             |
| Be careful what you say and how you say it                                               |                             |
| Don’t be upset with little hassles                                                       |                             |
| Use every opportunity to build up a sense of the importance of their own work            |                             |
| Give members goals, a sense of direction, something to strive towards and to achieve     |                             |
| Keep members informed on matters affecting them                                          |                             |
| Give members a chance to take part in decisions, especially those affecting them         |                             |
| Let members know where they stand                                                        |                             |
| Show members that their work is important and that they are respected                    |                             |
| Allow members to share their concerns, ideas, and plans with you                         |                             |
| Make sure that members have all the information needed to perform their responsibilities |                             |

Be flexible but hold your members accountable for their timelines and objectives related to their roles

Make sure that you are kept informed of their progress and allow them an opportunity to share that progress with others; this will keep everyone on the same page

Expect members to identify problems and ask them to propose solutions to such problems

Ask “what do you think?” often

Seek their advice and feedback on important plans, problems, projects, or ideas

Give your members and executives support

Give credit and take the blame

Brag about your members’ accomplishments

Maintain their interest by not assigning the same repetitive dull tasks

Lastly, be social and support their activities; help as needed

### Characteristics of effective team leaders

Good communication skills	Open, honest, and fair
Make decisions with input from others	Act consistently
Give team members the information needed to do the job	
Set goals and emphasize them	Keep focused through follow-up
Listen to feedback and ask questions	
Show loyalty to the group and the team members	
Create an atmosphere of growth	Have wide visibility
Give praise and recognition	
Criticize constructively and address problems	Develop plans
Share the group’s mission and goals	
Display tolerance and flexibility	Demonstrate assertiveness
Exhibit a willingness to change	
Treat team members with respect	Make self available and accessible
Want to change	
Accept ownership for team decisions	
Set guidelines for how team members are to treat one another	
Represent the team and fight a “good fight” when appropriate	

*By M.M. Starcewich and S.J. Stowell. Adapted from Teamwork: We Have Met the Enemy and They are Us, by M.M. Starcewich and S.J. Stowell, 1990, Bartlesville, OK: The Center for Management and Organizational Effectiveness.*

# A big thank you!

Again, let me say “thank you!” for all that you do for our student leaders. Please do not interpret this manual as a mandate for how you to interact with your students; rather, see it as a tool to assist you throughout the year. Each of you will determine the level of involvement that you have with your organization. Advisors should be accessible and interested and should provide counsel as needed.

The various icebreakers can help you develop your team and the group development information may be helpful as your group progresses into those stages.

Your time is greatly appreciated as is your involvement in our student’s co-curricular activities. Have a great year and I look forward to working with you!

There are many benefits associated with serving as an advisor to a student organization. Here are some:

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

*(from the ACPA Advisor’s Manual)*

Feel free to contact me if you have any questions, comments, suggestions or concerns...my number is X3572 and my email is [montela@stthom.edu](mailto:montela@stthom.edu).

## COC Financial Procedures

### Before you can take money out:

Signature card must be on file with the Office of Student Activities (this will be part of the club recognition process)

Signature card will include President and Treasurer's names as the only club members permitted to withdraw money. The club advisor will also have to sign the card acknowledging that all financial transactions will go through them.

### Petty Cash: \*Reimbursements will be allowed if \$200 or less

#### **Step One:**

Petty cash slip is filled out and signed by the Club's Advisor first. Slips are available in the Office of Student Activities (OSA).

#### **Step Two:**

The President or Treasurer brings the petty cash slip to the OSA for Angie Montelongo's (Director of Student Activities) approval and information. The account will have to show enough money to cover the expense before it is approved.

#### **Step Three:**

A copy of the slip is made for the Student Activities' club files.

#### **Step Four:**

Angie will "withdraw" the money from the club's "check register" that is kept in their club file. This will help the club and Student Activities keep a "rolling" tally of their account. This should be helpful since the Business Office reports are usually 4 weeks behind.

#### **Step Five:**

Receipts must come back to Angie so that copies can be made PRIOR to turning them into the cashier's office.

**\*Please note the following change in Business office procedures...all receipts must be turned in before a club can request an additional \$200. This will force clubs to plan ahead and/or potentially have members get reimbursed for club purchases.**

### Check Request:

#### **Step One:**

Student fills out the check request form (available online at the COC website and Student Activities' websites as well as in the OSA).

**Step Two:**

Obtain the club Advisors' signature.

**Step Three:**

Angie will then sign off (amounts higher than \$1000 will require Assistant Vice President of Campus Life-Matt Prasifka's approval). Copies of the check request and invoice will be made for the clubs' file in the OSA. The account will have to show enough money to cover the expense before it is approved.

**Step Four:**

Students will take the check request to Accounts Payable (2<sup>nd</sup> floor of Herzstein).

**Special Notes:**

Checks are only cut on Tuesdays and Fridays so plan accordingly.

An invoice or receipt is required for a check request to be fulfilled.

If this is a new vendor, there will need to be a W-9 on file so plan to have your vendor fax or mail that in. This must occur before the check is cut. Timing is critical so please plan ahead.

Please note that it is preferable that checks not be cut to individuals. In cases of conference travel, a hotel receipt can be faxed in order to process payment.

Reimbursements do not take long so students can pay for their travel and be reimbursed quickly.

**Reimbursements to club members:**

Please see above petty cash procedures if the amount is less than \$200.

In cases where the amount is above \$200, follow the check request procedures.

**Deposits:****Step One:**

Fill out a deposit slip in OSA or online at COC and Student Activities' websites.

**Step Two:**

Obtain Advisor signature.

**Step Three:**

Return slip to OSA for Angie's approval and information. A copy will be made for the clubs' files. The amount will be added to the clubs' "check register".

**Step Four:**

Take deposit to the Cashier at the Business Office. A receipt will be sent to Angie and she will file that in the clubs' file in the OSA.

**Other additional notes:**

Angie will send club Advisors semesterly budget updates.

The COC Treasurer will "audit" each club once per semester.

Club treasurers' will receive training at the Annual Leadership Summit. Those who do not attend will be required to meet with the COC Treasurer, COC Chair and Angie for training.

**Transfers from COC for approved funding requests:**

**Step One:**

Students fill out the funding request paperwork available in the OSA or online at COC and OSA's websites.

**Step Two:**

Obtain Advisor signature.

**Step Three:**

Turn in paperwork to COC Treasurer and/or COC Chair for review (will be due one week prior to COC's next meeting).

**Step Four:**

Make adjustments to request per COC execs' suggestions (if needed).

**Step Five:**

Present funding request at next COC meeting.

**If approved, Step Six:**

COC Treasurer sends Maria Quintero in the Business Office indicating the amount to be transferred into your clubs' account after receipts are turned in from the program's expenses.

At this time, Angie will add the money to your clubs' check register and a copy of the transfer memo is placed in the file.

**If not approved, process is over.**

## Fundraising policy:

The University of St. Thomas's Office of Institutional Advancement approaches potential donors on a regular basis to gain support for a variety of programs and projects. In order to coordinate donor solicitations, maximize your success, and prevent duplication of effort, the following guidelines should be followed in order to obtain prior authorization to seek donations on behalf of UST clubs or organizations.

Any club or organization that intends to pursue corporate sponsorship or solicit individual donations must provide the Office of Student Activities (OSA) with the following information at least one month prior to your event or specific need:

1. What is the purpose of the funds being requested? (i.e. what will you use the money for?)
2. What is the description of your project? Include date of event/project (if special event), location, and who the target audience is of your club or event.
3. What is your fundraising revenue goal?
4. What is your anticipated expense?
5. Who are you planning to approach? Please list.
6. Are you requesting specific sponsorships? (i.e. t-shirts, food, speaker fee, etc.) Please list levels of sponsorships available.
7. Please provide contact information for your club representative handling this matter and a note from your club's Advisor indicating knowledge and support of the club's fundraising request (located on the form)\*

The Office of Student Activities will discuss the club's request with Institutional Advancement and a determination of approval or disapproval will be made.

After the decision is made, the Director of Student Activities will contact the club representative, President and Advisor with the decision.

If the request is not approved, the club will be given a reason and/or a timeline for submitting the request again.

\*Fundraising forms may be picked up in the Office of Student Activities, first floor of Crooker Center.



5. Please list the individuals or companies you are planning to approach:
  
6. Please list specific sponsorships if they are available (i.e. t-shirts, food, speaker fee, etc.):
  
7. By signing below, the club/organization Advisor acknowledges his or her knowledge of this request as well as his or her approval for submission.

Advisor Signature \_\_\_\_\_

For Office of Student Activities Use Only:		
Date received in OSA _____		
Date shared with Institutional Advancement _____		
Approved	Yes	No
Comments:		

## Alcohol Policy

This policy sets forth regulations regarding the service, consumption, and distribution of alcoholic beverages to members and guests of the University of St. Thomas. The University strictly adheres to all city, state, and federal laws governing the distribution and consumption of alcohol and is committed to the national initiative of preventing alcohol and substance abuse. The general policies of the University concerning the consumption, serving, or sale of alcohol are:

1. The on-campus sponsoring student organization or administrative department must identify a faculty or an administrative sponsor for any event at which underage students (i.e., under 21 years old) will be present. Student organizations sponsoring an event must identify a student who is responsible for the event.
2. The faculty or administrative sponsor and the student contact person must sign a completed “Application for Use of Beer/Wine at Student Social Events” form and submit it to the Chief of Campus Security no less than three weeks prior to the event. Forms are available in the offices of Facilities Reservations, Campus Security, Student Affairs and Student Activities. If the sponsoring organization intends to charge for the alcohol in any manner (see point #12 below), a “Temporary Wine and Beer Retailers Permit” from the Texas Alcoholic Beverage Commission (TABC) will also be required. In the absence of the Chief of Campus Security, the form will be submitted to the Chief of Campus Security’s designated representative or, in his/her absence, to the Vice President for Student Affairs.
3. Advertising for the event must adhere to the following guidelines:
  - a. The main purpose of the event shall not be the consumption of alcohol.
  - b. Posters or flyers shall not mention the presence of alcoholic beverages to be served, nor shall free alcoholic beverages be the subject of any advertising.
  - c. Alcoholic beverage consumption contests are strictly forbidden.
  - d. Encouragement or reinforcement of irresponsible drinking behavior shall be prohibited in any advertising, as well as during the event.
  - e. A drink limit may be set for each event based on the duration of the event.
4. The sponsoring student organization is responsible for storage of all alcoholic beverages prior to the event. Kegs, casks, barrels, etc., will not be stored in cafeteria walk-in coolers, or in any area under the responsibility of University food service providers (Aramark). In addition, sponsoring organizations may only purchase alcohol from an approved vendor list (available from Campus Security or Student Activities).
5. Alcohol products are limited to beer and wine (kegs only; cans, bottles, other containers are prohibited). Dispensation and consumption of hard liquor are

strictly prohibited. Only those alcoholic beverages designated and purchased for the event prior to the event may be served and consumed during the course of the event. Additional alcoholic beverages may not be purchased, served, or consumed during the event. “Beer runs” are strictly prohibited, and are grounds for closing the event.

6. The sponsoring organization must have the required sponsor and as many security personnel from a UST approved security organization as are deemed necessary by the Chief of Security present for the entire event. The sponsoring organization will pay for the security personnel. Organizations may not provide their own security.
7. The university administrator is responsible for ensuring that every attendee at the event shows proof of legal drinking age (21 or older) prior to being served any alcoholic beverage. The only acceptable forms of identification are driver licenses, identification cards, or passports issued by a governmental entity. Consumption of alcoholic beverages by any person under the legal drinking age will result in disciplinary action against that person as well as against the person(s) who provided the alcoholic beverage. Disciplinary action may include but is not limited to university sanctions and possible legal actions.
8. The faculty or administrative sponsor and the student contact person are responsible for supervising the event at all times and for immediately requesting the assistance of the security personnel present should circumstances warrant it. No sponsor shall interfere with security personnel in performing their duties of maintaining order or enforcing the law. If in the opinion of the security personnel present the sponsors have ceased supervising the function or are failing to comply with law or policy, security has the authority to shut the event down. In such a case, the security details commander shall contact the Chief of Security and/or VPSA as soon as practical.
9. The faculty or administrative sponsor and student contact person are also responsible for making sure that the rights and privileges of the attendees are respected and that all other University policies are upheld.
10. Non-alcoholic beverages other than water must be available for those who choose not to drink alcoholic beverages and must be free of charge if the alcohol is free. Additionally, a sufficient quantity of food/snacks to feed the number of people in attendance must be available.
11. Alcohol may not be served before 4:00 PM, Monday – Friday, and not before 12:00 PM, Saturday and Sunday. Last call for alcohol will be one hour prior to advertised ending time (e.g., 10:00 pm for an event ending at 11:00 pm).

12. Charging for the alcohol served at the event in any manner, including a cover charge for the event or through donation, must be approved by the VPSA, and a “Temporary Wine and Beer Retailer’s Permit” must be obtained from the TABC by the faculty or administrative sponsor at their sole expense and effort.
13. TABC-certified servers may **only** be contracted through the Assistant Director of Student Activities. If the event is to be held in the Ahern Room, all food and beverage service must be contracted through the University of St. Thomas’ Dining Services.
14. Event participants are liable for loss, damage, or theft of institutional, contractor, or personal property occurring as a result of the event. If necessary, individuals or groups will be referred to the VPSA for disciplinary actions under the *Code of Student Conduct*.
15. Sponsors shall ensure that the area where the event is held is cleaned promptly and thoroughly following the conclusion of the event. The director of the area where the event is held will determine the extent of the cleaning to be done. If UST personnel or contractors have to clean the area, the sponsoring organization will be charged.
16. Violation of any provision of UST policy will result in a review of the event. Penalties may include possible revocation of event privileges for the sponsoring organization and individuals for a period of six months to two years.
17. Additional limitations or regulations may be imposed at the discretion of the VPSA, or his designee.
18. For end-of-year academic department socials, the in-house alcohol permit needs to be completed and turned in a minimum of 2 weeks prior to the event. Specific guidelines are as follows: please note that in either case, no beer bottles may be purchased; only kegs are allowed. Wine bottles are allowed. Alcohol is only allowed inside and cannot be taken outside of the approved event location.
  - a. If the event is for fewer than 50 people and limited to faculty, staff, and graduate students only, no TABC server or HPD officers will be required. The purchase of alcohol will be at the discretion of the Department and a faculty member must be responsible for any alcohol leftover after the event. Students cannot be responsible for the remaining alcohol in any instance.
  - b. If the event is for over 50 people and undergraduate students are attending the event, TABC servers, HPD officers and the 3-drink limit policies will be enforced. In this instance, the in-house permit is due 3 weeks prior to the event.

Note: If there is a cover charge associated with attendance and/or any other monetary exchange that might be perceived as related to the dispensation of alcoholic beverages, a TABC permit, TABC certified servers, and HPD officers are required without exception. Alcoholic beverages are limited to beer and wine. Liquor is strictly prohibited. Dispensation of alcoholic beverages must end one hour prior to the end of the event.

*Please note that failure to obtain a “Temporary Wine and Beer Retailer’s Permit” or other required documents from TABC, or violation of any other Texas Alcoholic Beverage Code laws, such as Providing Alcohol to a Minor or Minor in Possession of Alcohol, may result in the arrest of the party sponsors, alcoholic beverage servers, or attendees by TABC agents or other law enforcement officers.*

Revised July 1011

## **UST Policy on Speakers and Events**

### **PREFACE**

The University of St. Thomas is committed to the Catholic intellectual tradition and the dialogue between faith and reason. By instructing students in analytical and logical thinking, we assist in the preparation of UST graduates for important roles in civic leadership and in their quest for truth. Our community is guided by the Basilian values of goodness, discipline, and knowledge.

We are also committed to the vision and norms for education as set out in *Ex corde ecclesiae*,<sup>2</sup> and we seek to act in accord with the statement of the United States Conference of Catholic Bishops concerning Catholics in political life.<sup>3</sup>

To serve these objectives, members of the University community must be free to engage the full range of views on a variety of subjects and must also strive to maintain clarity about the identity of the University. Speakers may be invited to campus and events produced on campus that promote the University’s values, as well as to events that involve the expression of ideas or opinions that are contrary to Catholic doctrines and teachings.

From time to time speakers or events can be problematic because they compromise our Catholic identity or offend our core values.<sup>4</sup> In such cases the following considerations, modifications, or reasons for prohibition will apply.

### **SECTION 1**

a. **Faculty.** Faculty interested in inviting guest speakers to campus or hosting events on campus shall seek the timely advice of colleagues, appropriate department chairs, and appropriate deans, before arranging for speakers or events where it may be anticipated that the speech or event will offend the University’s identity, values or mission. If the prospective invitation is questioned by a member of the UST community, the Vice President for Academic Affairs shall make the initial determination as to the propriety of the invitation after considering the matters outlined in sections 2 and 3.

b. Requests by Students or Student Groups. A student or student group intending to invite a guest speaker to campus or to host an event for the public on campus must follow policies and procedures adopted by the Vice President for Student Affairs regarding guest speakers and events including obtaining advance approval from the Vice President for Student Affairs, or designee, so that the modifications will be considered before any invitation is extended.

c. Requests by Staff. Members of the UST staff who wish to invite a guest speaker to campus or to host an event for the public on campus must follow policies and procedures adopted by the appropriate executive regarding guest speakers and events including obtaining advance approval from the executive or designee, so that the modifications will be considered before any invitation is extended.

## **SECTION 2**

### **Review By Faculty and Administrators**

a. In reviewing any request for a guest speaker or event, where the speaker, event, or speech may compromise the Catholic identity and mission, the faculty, department, staff, Vice President for Academic Affairs, Vice President for Student Affairs, or designee, shall seek, where possible, modifications to the speech or event which, short of prohibiting it, would address the concerns and give consideration to:

1. The educational content and value of the proposed speech or event;
2. The degree of faculty involvement in planning the speech or event;
3. The academic or educational context for the speech or event; and
4. The amount of co-sponsorship by faculty and campus organizations.

## **SECTION 3**

### **Modifications**

a. The concern about compromising our Catholic identity and mission may be addressed by applying the following modifications:

1. Issuing disclaimers;
2. Requiring that a question and answer period immediately follow the speech or event;
3. Creating counter programming at a different time;
4. Balancing the speech or event with opposing views;
5. Changing the date or venue of the speech or event, or otherwise providing appropriate context for those attending;
6. Other appropriate options.

## **SECTION 4**

### Prohibition of Speech or Event

a. Prohibition of Speech or Event. If the application of modifications from 3a is not possible or is inappropriate, an invitation may be withdrawn, or permission to invite a guest speaker or to host an event may be denied altogether if:

1. By advocating positions or activity contrary to Catholic teachings, the speaker, speech or event is likely to compromise or offend the University's core values or mission as a Catholic liberal arts institution, and the person or group seeking permission refuses to accept modification;
2. There is a substantial risk that the speaker, speech or event would conflict with University policies concerning the creation of a hostile learning environment;
3. The speech or event poses a substantial risk to the physical safety of members of the community;
4. There is a substantial risk that the speech or event would disrupt University classes or obstruct access to campus facilities;
5. The speech or event would violate the civil or penal laws of the City of Houston, State of Texas, or the United States.

*Notice: A decision by an administrator to deny or condition permission for a guest speaker or event must be provided in writing to the interested University party.*

## **SECTION 5**

Appeal. The administrator should strive to give the persons and groups supporting or opposing the speech or event, an opportunity to be heard. A party may appeal the administrative decision to the President. The President shall have final authority to grant, deny, or condition usage of University property for any guest speaker or event. When the President exercises his authority to permit, condition, or deny permission for a guest speaker or event that has been questioned, the President will state his reasons in writing to the appropriate members of the University community.

## **SECTION 6**

Academic freedom. This policy supplements faculty handbook section 6.1 on academic freedom.

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## **ANNOTATIONS**

*Example of Disclaimer: An invitation to a guest speaker or the production of an event does not express or imply approval, endorsement, or sponsorship of the views expressed by the speaker or any aspect of the event by the University of St. Thomas or any of its community.*

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## ENDNOTES

<sup>1</sup> This policy was adopted from a similar policy at Gonzaga University with permission from President Robert J. Spitzer, SJ

<sup>2</sup> [*Ex corde ecclesiae*] JOHN PAUL II, Apostolic Constitution of the Supreme Pontiff John Paul II on Catholic Universities, 15 August 1990.

<sup>3</sup> [*Bishops Issue Statement on ‘Catholic in Political Life’ Washington (June 21, 2004)*] The text can be found at <http://www.usccb.org/bishops/catholicsinpoliticallife.htm>.

<sup>4</sup> CONSTITUTION ON THE CHURCH IN THE MODERN WORLD (*Gaudium et Spes* sections 27, 51) Second Vatican Council December 7, 1965; John Paul II, *The Gospel of Life*, sections 12, 95.

Approved by the President: \_\_\_\_\_

Date: \_\_\_\_\_

Sample Advisor Contract:

You may choose to discuss expectations informally but this contract could be a useful tool in “formalizing” those expectations.

*The members of (organization) request (name) to serve as Advisor of the organization for a period not to exceed (how long) beginning (date).*

Duties, responsibilities, and expectations of the position are as follows:  
(list all responsibilities and expectation of the Advisor and organization)

Duties and responsibilities may be reconsidered at the request of the Advisor, president or majority vote of the membership in a regular meeting.

President’s Signature \_\_\_\_\_ Date \_\_\_\_\_

I have met with the president of the above-named organization and discussed the duties and responsibilities of Advisor as listed above. I agree to serve as Advisor and will fulfill these duties and responsibilities to the best of my abilities.

Advisor’s Signature \_\_\_\_\_ Date \_\_\_\_\_

This contract is effective for \_\_\_(period) \_\_\_ and may be renewed each year thereafter upon the agreement of both parties.

\*Information adapted from ACPA Commission for Student Involvement Advisor Manual (specifically Jim Mohr, Advisor for Student Organizations and Greek Life, Eastern Washington University).

### Advising Dos:

- Be familiar with UST and COC policies and procedures
- Assist executive officers with procedural matters
- Be knowledgeable about the club's constitution and bylaws; help the execs and general membership adhere to them (read the constitution at a meeting)
- Empower students to take action and to take satisfaction in seeing the student organization succeed
- Work with other advisors to student organizations on campus
- Develop clear expectations with officers and your role as the Advisor and their roles as leaders of the club
- Interact with your club members...get to know them on an individual level. What do they want from the organization? What can they give to the group?
- Work with executive officers individually as well as a team; help them set goals and their vision for the club. Encourage them to share reports regularly with the general membership.
- Discuss concerns with officers in private and praise them in public.
- Assist in officer transition and recruitment of members (orient new officers and members to the history and purpose of the group and help them build upon it).
- Know when a student is spending too much time with club responsibilities versus academic responsibilities
- Serve as a resource person (i.e. help to resolve intragroup conflict or a specific financial issue)
- Enjoy the impact you can have on the students' development.
- Carefully review financial reports and work with the Treasurer and President closely on these matters
- Be visible and choose to attend group meetings and events but also adhere to your limits and have the students respect your time constraints.
- Keep your sense of humor and enthusiasm. Share creative suggestions and provide feedback for activities planned by students.
- Be consistent with your actions. Model good communication skills and listening skills. Develop a good rapport with your students.
- Head off situations that might give rise to poor public relations for the student group or University.
- Be available in emergency situations.
- Plan and encourage attendance at leadership training.
- Do things right and 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:

- Impose your own bias
- Take everything so seriously
- Tell the group what to do or do the work of the executive team
- Allow the organization to become a one-person organization
- Manipulate the group, impose, or force your opinions
- Close communications
- Be afraid to let the group try new ideas
- Forget to be objective
- Know it all; allow the students to make mistakes and learn from them
- Say I told you so
- Be the leader or “run” the meeting
- Allow members to dwindle away; encourage the exec team to delegate and trust the members around them
- Assume that they don't need you or that everything is okay; check in with the Office of Student Activities if you have questions
- Forget that the group's attitudes, needs and personalities may change year to year

*\*Information adapted from ACPA Commission for Student Involvement Advisor Manual*

### 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 good officer transition early on will mean less time spent throughout the year nursing new officers through the year.

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, including: completed projects for the past year, upcoming/incomplete projects, challenges and setbacks and anything the new officers needs to know to do their job effectively.

The advisor's role may be to:

- Facilitate discussion and be a sounding board for ideas
- Organize and provide the structure of a retreat
- Offer suggestions on various questions

- Refrain from telling new officers what they should do
- Fill in the blanks; if an outgoing officer doesn't know how something was done, or doesn't have records to pass on to the new officer, you can help that officer by providing the information he or she doesn't have.

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

#### One-on-One Training, Advisor with Officers:

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

Things to include in a (new) notebook: any forms the officers may need to use, copies of previous meeting agendas, and a copy of the organization constitution and by-laws.

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

*\*Information adapted from ACPA Commission for Student Involvement Advisor Manual (specifically Jim Mohr, Advisor for Student Organizations and Greek Life, Eastern Washington University).*

## Hazing Guidelines

Hazing refers to 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 any organization whose members are or include students at an educational institution. Hazing is strictly prohibited, and potential violators may be subject to the disciplinary procedures as outlined by the *Code of Student Conduct*.

## Student Travel Guidelines

### I. PURPOSE

The University of St. Thomas has developed the following guidelines and procedures for UST students traveling to a university sponsored or university supported activity. These guidelines and procedures are designed to ensure the safety of all university members attending events, outline university expectations for student behavior at events, and minimize the liability and risk associated with student travel. These guidelines and procedures apply regardless of funding for the event (i.e. even if student activity fee money is not used for the event, this policy remains in effect).

### II. GENERAL GUIDELINES

#### What is organized student travel?

Organized student travel refers to students carpooling and traveling beyond 60 miles from campus for a university event. It also refers to students traveling by plane or bus to out-of-town events (including but not limited to sport clubs or intramurals). This policy includes students traveling to a conference or to another professional development opportunity.

#### Can the university vans be used?

If a university van is being used to provide the means of transportation, these guidelines and procedures are effective. There are specific van procedures that can be obtained from the Office of Student Affairs (Crooker Center, second floor), which include having a university approved driver.

#### What is needed by a student driver?

If students drive their own vehicles for the organized student travel, they must have a valid Texas or other state driver's license and possess personal automobile insurance coverage as mandated by the State of Texas. Vehicles must also have a current state inspection and registration. Copies of both will need to be submitted to the Office of Student Activities.

#### Can a student group travel outside of the country?

Yes and should the organized student travel take students out of the country, the same rules will apply (including that students must have appropriate licenses, certificates and insurance as required by the country where the student is traveling). Additional paperwork

will also be required and can be obtained from the Office of Student Activities or the Office of Recreational Sports.

Are there forms that need to be completed prior to travel?

Yes. The appropriate forms can be obtained from the Director of Recreational Sports or the Director of Student Activities.

What do we need to do to organize a trip?

Each student trip will need to identify a “trip coordinator” who will be the primary contact for the organization. This person may be a student or faculty/staff advisor. The trip coordinator is responsible for completing all paperwork at least 14 days prior to the planned trip. **A mandatory pre-trip meeting will be required prior to your first trip. This meeting will be attended by a member of the Campus Life team, the “trip coordinator” and/or the Advisor/Coach.** The purpose of the meeting is to coordinate the paperwork and review the policy for each student making the trip.

Organized Student Travel Paperwork includes:

- Club/Organization Travel Authorization Form (includes trip itinerary)
- All signed travel waivers
- All necessary insurance information from any one who may be driving during the trip
- Copies of any drivers’ registration and a notation of any vehicle’s inspection expiration date
- Complete emergency contact information on every student traveling
- Confirmation that all students traveling have an updated medical insurance card with them on the trip
- Copies of the “UST Travel Policy Participant Responsibilities” form to be distributed at the mandatory pre-trip meeting
- Copies of the “Safety Guidelines for Drivers and Occupants” form to be distributed at the mandatory pre-trip meeting

Copies will be provided to the Director of Student Activities or the Director of Recreational Sports; originals will stay with trip coordinator during the trip.

What is expected of students participating in student events away from campus?

As a Catholic university, we expect that students will act in accordance with our core values and Catholic mission at all times. As representatives of the university, students are expected to abide by the Code of Student Conduct while attending or participating in activities that represent the University of St. Thomas. Students may be subject to disciplinary action should these expectations be violated.

## UST SAFETY GUIDELINES FOR DRIVERS AND OCCUPANTS

Drivers and occupants participating in a UST organized student travel trip are expected to act responsibly and use sound judgment while traveling:

Drivers must:

- Possess a valid driver's license
- Obey all traffic laws and regulations, including posted speed limits
- Not drive under the influence of alcohol or illegal drugs or transport or possess alcoholic beverages, illegal drugs, unauthorized firearms or other types of weapons
- Confirm that the vehicle in which the group or individual is traveling has appropriate insurance as mandated by the State of Texas, as well as a current state inspection and registration

Drivers and occupants must:

- Wear seat belts at all times. The number of occupants in the car must not exceed the number of seat belts. It is strongly recommended that passengers in the backseats also wear their seat belts.
- Confirm that the vehicle's recommended load capacity is not exceeded
- Avoid any distractions (i.e. texting, talking on a cell phone, horseplay, racing, etc.) or aggressive behavior

Drivers are encouraged to follow these safe driving and traveling practices:

- Begin the trip well rested
- Notify a designated contact person upon departure and arrival
- Avoid driving when conditions are hazardous (i.e. fog, heavy rain, snow or icy conditions); stop the trip and check into a motel if weather conditions or fatigue prevent the trip from continuing safely
- Plan routes in advance (if carpooling, ensure that all drivers are aware of the routes prior to departure)
- Divide the trip into segments (as necessary) and stop for rest as it is deemed appropriate
- Make sure at least one person in each vehicle has a cell phone or two-way communication device for emergency purposes
- Establish a reasonable departure and arrival time to and from the activity or event (i.e. avoid driving between Midnight and 6:00 a.m.)
- Rotate drivers every 2 hours
- A passenger should remain awake with the driver at all times
- Carry a flashlight, fire extinguisher and other recommended travel safety items
- Avoid taking medication that may harm your ability to drive safely

## **University of St. Thomas Policies**

EVENTS POLICY Policy Number: G.04.02

### **EVENTS POLICY Policy Number: G.04.02**

#### **SCOPE**

All staff, faculty, students and external groups who reserve or rent facilities for events.

#### **PURPOSE**

The number and complexity of special events hosted on campus has increased as a result of the growth of the University requiring the development of a system for event planning that establishes standards for procedures and protocols. Many events attract visitors to our campus and are opportunities for us to reach out to organizations and individuals within the community. This policy will ensure that campus facilities are used in a manner consistent with our University mission and Catholic and Basilian core values, and that events will be conducted in a professional manner.

#### **DEFINITIONS**

##### Budget Worksheet

The budget worksheet assists event planners with estimating the costs associated with their event.

##### Event Coordinator

Event coordinators are personnel that assist event planners with event details, logistics, and policy compliance. Event coordinators are able to update the Master Calendar for events in their respective areas. A listing of current event coordinators can be found at the end of this policy.

##### Event Planner

The event planner is the person that is organizing and requesting the event.

##### Event Planning Worksheet

The event planning worksheet is a step-by-step guide to event planning at UST.

##### Event Request Form

The event request form describes the event's purpose, sponsors, date/time, costs and other relevant information and seeks approval for the event.

##### External Events

External events are events located on campus in one of our facilities that have no direct connection to the University of St. Thomas. Essentially, the event organizers are renting our facilities.

##### Internal Events

Internal events are events officially sponsored by a UST department or group. These events may include attendance by the public.

##### Master Events Calendar

The master events calendar is the official publication that contains dates, times, locations, description, and contact information for all approved campus events. The master events calendar is maintained by the assistant director of public affairs, but can be updated by event coordinators.

##### Sanctioned Events

Sanctioned events are internal events that take priority over other events and may preclude the scheduling

of other activities during the same timeframe. These events are usually long-standing and scheduled on an annual or other periodic basis.

## **POLICY/PROCEDURE**

### **1. Approvals**

Internal events must be sponsored by an officially recognized campus department or unit; registered or sponsored student group; student government; or a sponsored departmental or campus organization. All other organizations are considered external groups and must comply with the policies and procedures governing such groups. Academic-sponsored events must be approved by the VPAA or designee. Events sponsored by other departments must be approved by the respective vice president or designee. Student events must be approved by the Office of Student Activities. The respective vice president or designee will assign an event coordinator for each event.

External events (unless otherwise noted) must be scheduled through the Office of Facilities Reservations with approval by the VPAA, VPIA or VPSA /EM. The facilities reservations coordinator will copy the VPF and Special Assistant to the President on all requests for outside space rentals. Events with a known Catholic sponsor will be approved and the VPF will be notified.

### **2. Sanctioned Events**

Several campus-wide events, known as sanctioned events, are of such importance to the University that competing events are not allowed. Whenever possible, sanctioned events should be scheduled during the previous academic year so that the calendar can be made available for other events. Events can be added or removed from this designation at the discretion of the President. A listing of current sanctioned events can be found at the end of this policy.

### **3. Consistency with University Values**

The University reserves the right to refuse to reserve or rent its facilities to a group that intends to advance values inconsistent with the University or for an event that it deems inappropriate.

### **4. Posting to the Master Events Calendar**

Several individuals have responsibility for event planning for their respective areas. Their duties include assisting event planners with planning and logistical support and posting events to the Master Events Calendar. Once an event is approved, it must be posted to the calendar. This can be done by the Office of Academic Affairs, Office of Public Affairs, the Office of Student Activities, the Office of Undergraduate Admissions, the Office of Facilities Reservations, and the Office of Advancement Projects. Posting to the Master Events Calendar reduces the likelihood of scheduling conflicts.

### **5. Campus Security**

Campus Security will determine the necessity for security personnel at an event.

### **6. Related Policies**

Campus events and facilities usage must also comply with existing University policies. Related policies include ADA, Alcohol, Brand and Seal Usage, Demonstration, Political Speakers, Sign Posting, and Speakers.

### **7. Process for Internal Events**

- a. Check the Master Events Calendar to determine if there are other events that are scheduled might impact the success of your event. Blackout dates and times for “sanctioned events” will be noted.
- b. Check the availability of facilities including room capacities and layouts.
- c. Reserve the facility pending event approval by contacting the Office of Facilities Reservations at 713-525-3574. Acknowledge that you have received and agree to comply with the Facilities

Usage Policies and Guidelines. The facility will be held for two weeks.

- d. If you want the President to attend, complete a President Event Attendance Request form or contact the Office of the President at 713-525-2160 or [president@stthom.edu](mailto:president@stthom.edu).
- e. Complete the Event Planning Checklist. This will help you determine which services you require for your event and estimate costs.
- f. Create a budget and complete the Budget Worksheet. Determine source for funding and costs. Some required internal services have set costs which event planners must budget. External services and products may require bids or contracts that outline the costs.
- g. The event coordinator will be responsible for reviewing the details of the event to ensure compliance with policy and protocol guidelines and assist with final event logistics.
- h. The event coordinator will submit an Event Request Form to the appropriate VP or designee for approval.
- i. Once the event is approved, the event coordinator will confirm the event with the Office of Facilities Reservations.
- j. The event coordinator or public affairs personnel will update the Master Events Calendar.
- k. After the event is completed the event coordinator should evaluate the event to determine areas for improvement.

### **8. Process for External Events**

- a. If a group requests use of campus facilities, a short description of external event requests will be sent to the appropriate vice president (academic affairs, student affairs, institutional advancement) to determine suitability of the event.
- b. The respective vice president will review the purpose of the program, organization presenting the program as well as program sponsors/underwriters among other factors to determine if use of University facilities is appropriate and notify the office of facilities reservations.
- c. If the event is approved, the office of facilities reservations confirms room and date availability.
- d. The requestor will review and accept rental terms. (Acceptance of Facilities Usage and Procedures Guideline Form as well as the letter of intent to be completed.)
- e. The requestor will submit contract and security deposit.
- f. The contract is submitted to vice president for finance for signature.
- g. A copy of contract is sent to renter for signature (includes cancellation, change of facilities, damages, housekeeping, insurance, catering policy, media services' charges).
- h. The office of facilities reservations receives contract a minimum of two weeks prior to event (note that payment is due prior to the event or the event is not held)
- i. The office of facilities reservations confirms resources with the renter two weeks prior to the event.

**APPROVED: Dr. Robert Ivany Date: September 1, 2010**  
**Effective Date: September 1, 2010**