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Welcome to Leadership Initiatives!

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

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 Leadership Initiatives oversees over 250 student-run organizations, and we have several services and resources to help you and your organization achieve success. Leadership Initiatives 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 Leadership Initiatives 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 328T. You can also drop us a quick email at leadership@shsu.edu or call us by phone at 936-294-3000.

Sincerely,

Meredith Conrey
Director of Leadership Initiatives
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 to assist advisors and 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 clarify several on- and off-campus policies that student leaders, student organizations, and organization advisors are expected to follow. Abiding by these written policies can ensure that your student organization is functioning 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 specific 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 Leadership Initiatives for the academic year, the student organization must meet with the Department of Leadership Initiatives 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 Leadership Initiatives:

- Listing in student organization directories
- Access to campus meeting facilities, such as in 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 services in the Department of Leadership Initiatives
- The opportunity to display posters announcing meetings and other activities
- The possibility to hold fundraising activities on campus
- Access to OrgLINK, the only way to get connected digitally and manage your organization’s rosters and events at Sam Houston State University
- The opportunity to send your program/event information and organization announcements to campus via OrgLINK.
How do you become recognized with the University as a new organization?
Becoming a recognized student organization is a fairly simple process. Five students and one full-time faculty/staff advisor are required to submit an application. Each student group seeking recognition must complete a New Organization Application on OrgLINK.

Once a student completes the New Organization Application, a professional staff member of the Department of Leadership Initiatives will review the materials. During this process, staff members will verify and confirm the validity of the five student members and the faculty/staff advisor. The department will also review the new student organization’s constitution and ensure that the document adheres to the Constitution Checklist provided by our department (located at www.shsu.edu/leadership).

After all items have been reviewed, the Leadership Initiatives staff member will then reach out to the student who submitted the application for a meeting. During this meeting, the staff member and the applicant will review all materials provided. If any updates are needed, the applicant will make the necessary updates and provide them to the department.

As soon as all requirements are met, paperwork will be sent to the Office of the President to request official recognition of the student organization. This request could take up to two weeks.

When the department receives approval, an email will be sent to the president and the advisor of the new organization congratulating them on their recognition and informing them of the next steps in becoming a recognized student organization. The next steps include:

- Attending New Organization Training
- Registering for the upcoming academic year and Student Organization Leadership Retreat

As long as the student organization meets these requirements, they will remain recognized by the Department of Leadership Initiatives and by Sam Houston State University.

If you or a student have questions regarding our services, paperwork, or if you need to update information, please do not hesitate to contact the Department of Leadership Initiatives.

Category or Type of Student Organization
In accordance with your organization’s purpose and/or mission statement, the classification of your organization will be chosen and approved by the Department of Leadership Initiatives. Descriptions are listed below.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td>Organizations housed under or sponsored by an SHSU academic department</td>
</tr>
<tr>
<td>Advocacy</td>
<td>Organizations that advocate for a specific group or cause</td>
</tr>
<tr>
<td>Diversity</td>
<td>Organizations that highlight the diverse populations on campus</td>
</tr>
<tr>
<td>Recreational</td>
<td>Organizations housed under and managed by Recreational Sports</td>
</tr>
<tr>
<td>Religion &amp; Spirituality</td>
<td>Organizations that focus on the religious and spiritual aspects of campus life</td>
</tr>
<tr>
<td>Social Fraternities &amp; Sororities</td>
<td>Organizations housed under and managed by Greek Life</td>
</tr>
<tr>
<td>Special Interest</td>
<td>Organizations that focus on a special interest or skill</td>
</tr>
</tbody>
</table>
Annual Organization Registration
The Department of Leadership Initiatives requires that all student organizations register on OrgLINK by the 12th class day of the fall semester. 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 Leadership Initiatives 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.

Access and Services for Recognized Student Organizations

- OrgLINK
- Host Events on Campus
- Promotion of Organization Through Institutional Media
- Event Access and Leadership Development
- Campus Life Development Fund
- Student Affairs Travel Fund
- Student Graphic Designer
- Organization Consultations
- Incentive Programs
- Organization Contests
- Administrative Support for Copies, Posting Approvals, etc.

A full description of each above service can be located at www.shsu.edu/leadership.

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 campus Student Guidelines. The full Student Organizations Policy and SHSU’s Student Guidelines can be found on the Dean of Students Office website: https://www.shsu.edu/dept/dean-of-students/guidelines/student-guidelines

Non Discrimination Statement:
“Sam Houston State University is guided by the precept that in no aspect of its program shall there be differences in the treatment of persons because of race, creed, color, sex, or national origin. In accordance with this principle, along with other published student policies, all organizations will refrain from conducting any pledging, initiation, or other extracurricular activities that will in any way be detrimental, defamatory, ridiculing, or embarrassing to any race, color, creed, or national origin. All organizations should be well aware of the Texas State Statute on Hazing.”

As a student organization, are we responsible for knowing, understanding, and adhering to any risk management policies and practices?
Yes, all Sam Houston State University students must adhere to the campus Student Guidelines. The full Risk Management Policy can be found within the Student Guidelines on the Dean of Students Office website. The Risk Management Policy begins with the following Statement of Purpose:
“Every student organization no matter how large or small inherently possesses exposure to risk and safety concerns. Therefore the purpose of this policy is to assist in creating a safe environment where students, faculty and staff members can enjoy the benefits of membership, affiliation and participation in the activities and events of recognized Sam Houston State University student organizations.”

…and concludes with the following Violations Policy:

“The Dean of Students Office may review, investigate and adjudicate possible violations of the Risk Management Guidelines or Code of Student Conduct by any organization, its members or affiliates. The procedures and sanctions for violations may be found in the SHSU Student Guidelines.”

Student Organization Travel

Student organizations traveling 25-miles (or more) away from Huntsville, Texas, must fill out the Student Organization Travel Form and turn it into the Department of Leadership Initiatives at least 10 business days prior to travel. It is preferred that this form is typed.

Student organization leaders are also strongly encouraged to meet with a professional staff member in the Department of Leadership Initiatives to discuss travel plans and to obtain a waiver for travel.

In the event of an emergency while travelling, (such as, but not limited to, a health concern, injury, accident, natural disaster), local police must be called at 911 immediately during domestic travel. For international travel, the appropriate local authority must be contacted. Activity/event leaders must carry an itinerary for the activity/event and a list of participants at all times during the activity/event and all associated travel. Participants must carry an itinerary and the names and telephone numbers of all activity/event leaders during the activity/event and all associated travel.

Advertising and Posting Policies:

Where can a flyer be created?
There are two options for creating flyers. The first option is to have any member of your student organization create a flyer design. The second option is to have the graphic designer in the Department of Leadership Initiatives create a flyer design for you. You provide our graphic designer with your program details, and they’ll do the rest. The design takes anywhere from 3-5 business days and is available at no charge.

How many copies of the flyer can we have?
Each student organization is allotted 50 FREE (black and white) copies per week. As previously stated, check with other organization members because these 50 copies include flyers, agendas, minutes, etc.

Other than flyers… what else can the graphic designer create?
If you can dream it, they likely can do it! For example, they can create designs for social media, t-shirts, banners, web pages, and brochures. Email leadership@shsu.edu to schedule a time to meet with them personally. Although they can create several designs for you, you’ll have to contact an outside printing company to have your design produced on an item. If the design has any licensed materials (i.e., anything
that is copyrighted or trademarked) additional approval may be needed, as well as, the use of a licensed vendor to produce the item.

Are there any policies that govern the approval and where/when we can post/distribute materials? Yes, please reference the Posting and Distribution of Printed Materials section of the Student Guidelines.

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 his or her 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 Leadership Initiatives 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 feel free to contact the Department of Leadership Initiatives.

Advisor Expectations
The Department of Leadership Initiatives expects all student organization advisors to…

- Hold members accountable for their actions
- Serve as a “sounding board” for student leaders to bounce ideas off of
- Be knowledgeable of University policies and guidelines that may impact student leaders or the organization itself
- Provide continuity and stability as student leaders change from year to year
- Assist student leaders in making informed and wise decisions
- Provide the student group with “connections” to other faculty, staff, and student leaders
- Give HONEST feedback to group members to assist them in their personal growth and development as student leaders
- Help the student group deal with an organization crisis or mishap
- Act as a consultant in areas of goal setting, problem-solving, organization policy making, and upholding guidelines and their purpose
- Intervene when appropriate (i.e. resolving conflict between group members)
• Sign University paperwork on behalf of the student organization

**Student Leader Expectations**

When working with advisors, the Department of Leadership Initiatives expect 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 in the structure or policies of the organization are made. Also, consult with them before major projects are undertaken. 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 ultimately 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.

**Finances and Budget**

Encourage the Treasurer to attend Treasurer Training each semester. Are the members paying dues on time? Are there unaccounted-for funds coming in or out? Is the budget balanced? Does the organization’s ledger match the bank’s ledger? For additional information on advisor responsibilities in finance, refer to the Financial Operations section of this Handbook.
## Advisor Expectations Checklist

<table>
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<tr>
<th>Task</th>
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</thead>
<tbody>
<tr>
<td>Attend all general meetings.</td>
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<tr>
<td>Attend all executive board meetings.</td>
</tr>
<tr>
<td>Call meetings of the executive board when believed to be necessary.</td>
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<tr>
<td>Explain University policy when relevant to the discussion.</td>
</tr>
<tr>
<td>Explain University policy to the entire group once a year.</td>
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<tr>
<td>Help the president or other officers prepare an agenda before each meeting.</td>
</tr>
<tr>
<td>Speak up during discussion when the advisor thinks the group may make a poor decision.</td>
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<tr>
<td>Remain quiet during the general meetings unless called upon.</td>
</tr>
<tr>
<td>Exert influence with officers between meetings.</td>
</tr>
<tr>
<td>Take an active part in formulating the goals of the group.</td>
</tr>
<tr>
<td>Initiate ideas for discussion when the advisor believes they will be helpful to the group.</td>
</tr>
<tr>
<td>Be “one of the group,” except for voting and holding office.</td>
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<tr>
<td>Attend all group activities, meetings, events, etc.</td>
</tr>
<tr>
<td>Check the secretary’s minutes before they are written in final form.</td>
</tr>
<tr>
<td>Obtain copies of all official correspondence.</td>
</tr>
<tr>
<td>Be a custodian of all group paraphernalia, records, etc. during the summer and between officer transitions.</td>
</tr>
<tr>
<td>Keep the official files of the organization.</td>
</tr>
<tr>
<td>Inform the group of infractions of their bylaws, codes, and standing rules.</td>
</tr>
<tr>
<td>Make the group aware of its stated objectives when planning events.</td>
</tr>
<tr>
<td>Be responsible for planning leadership skills workshops.</td>
</tr>
<tr>
<td>Insist on an evaluation of each activity by those students responsible for the program planning.</td>
</tr>
<tr>
<td>Take the initiative in developing teamwork and cooperation among the officers.</td>
</tr>
<tr>
<td>Let the group succeed or fair on its own; do not interfere unless requested.</td>
</tr>
<tr>
<td>Represent the group in any conflicts with members of the University staff.</td>
</tr>
<tr>
<td>Be familiar with University resources and procedures that affect group activities.</td>
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<tr>
<td>Recommend programs, speakers, etc.</td>
</tr>
<tr>
<td>Take an active part in the orderly transition of responsibilities between old and new officers.</td>
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<tr>
<td>Cancel activities when they have been poorly planned, will violate University rules, or are unsafe.</td>
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</tbody>
</table>
Hazing Policy
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 Leadership Initiatives. Furthermore, the Department of Leadership Initiatives do not support or condone hazing. There is a section in the Student Guidelines outlining the Texas Education Code’s definition of hazing as well as the responsibilities of student organizations in regards 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.” It is important to note that based on Texas Education Code Section 37.154, “It is not a defense to prosecution of an offense under this subchapter that the person against who the hazing was directed consented to or acquiesced in the hazing activity.”

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. https://www.shsu.edu/intranet/policies/forms/

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 Leadership Initiatives, the Dean of Students Office, or University Police.

Discipline
The first step is to determine that no violations of law or Student Guidelines occurred. If a violation occurred, you must report it to either University Police (law) or the Dean of Students (Student Guidelines). Second, an organization must follow disciplinary procedures within their constitution. If you have a question related to student discipline, please contact the Department of Leadership Initiatives.

Student Concerns
It’s only logical that a student might seek out a role model with whom they’re comfortable being themselves. As an advisor, you should be sensitive to their concerns and listen attentively, and know when and where to refer a student depending upon their concern. If at any time you feel as though they have surpassed your area of expertise or reached a concerning point, refer to the Students of Concern process and Counseling Center.

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

Encourage 1-on-1 meetings 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 to 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 a 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 turned 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 to 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 Leadership Initiatives 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**.

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**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).

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**Stage 1: Forming**
- Major Issues: Belonging & Trust
- Leader's Role: Create a comfortable atmosphere. Propose activities that emphasize similarities and establish rules. Clarify organization goals and purpose.

**Stage 2: Storming**
- Major Issues: Power & Authority
- Leader's Role: Validate their differences and help them work through their conflict. Teach communication skills and provide varying perspective. Help the group make structured decisions.

**Stage 3: Norming**
- Major Issues: Belonging & Trust
- Leader's Role: Support their attempts at finding solutions, help clarify norms and identify progress.

**Stage 4: Performing**
- Major Issues: Productivity, Problem Solving, & Intimacy
- Leader's Role: Take a back seat and let the group perform. Help them reflect on their learning and successes, be supportive and challenge the group.

**Stage 5: Transforming**
- Major Issues: Closure
- Leader's Role: Positive affirmations are definitely helpful. Focus on their growth, validate their experiences, use rituals/ceremonies to bring closure, discuss newest plan of action.
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 in which 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.

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**Guiding Students through Officer Transitions**

**What exactly is officer transition?**
The phrase “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 his/her new position is passed down as well. The Department of Leadership Initiatives refers to this as Officer Transition and offers training every semester for incoming/outgoing officers to cover important information and skills.

This transition will take place whether or not a student leader is ready for it – but that’s why we offer Officer Transition Training. Outgoing leaders may have the tendency to simply pack up and go, leaving a box of files (or worse: nothing) and a confused student leader. However, what they fail to realize is that poor transitioning can ultimately hurt the organization.

The goal of having a successful officer transition maximize knowledge and details for a smooth transition. As an advisor, you can help to 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 every semester.

**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
  - 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 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.

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 that 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 Guidelines on Social Events
Student organizations hosting social events must follow the requirements for the designated event level/type found in the Student Guidelines. The full language of the policy regarding social events can be found under Risk Management Guidelines in the Student Guidelines.

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 936-294-1930 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
The University does not have a specific policy when it comes to student organizations working with outside vendors. However, if you receive financial assistance from the University, then will you have to follow guidelines for purchasing. Before you make a commitment to work with an outside vendor, check with the sponsoring department for their specific policies regarding working with vendors. Please contact the Procurement and Business Services office at 936-294-1894 or visit their website.
Financial Operations

Financial Planning

Student organizations are similar to a small businesses and should operate as such. You don’t have to be an accountant to keep track of your organization’s income and expenditures. Maintaining a budget doesn’t have to be a complex task. However, depending on the needs of your organization, the history of your budget transactions could require more than other student organizations. You should always keep copies of old budgets and use them as resource guides when working with your new budget and organization treasurer. A resourceful way to handle your finances is by setting up an off campus student organization checking account. As a student organization on our campus, you are subject to be audited by the University’s Internal Audit office, and it’d be within your favor to have your finances in order.

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. You can use any bank of your choosing.

Can we use a member's personal account for our student organization funds?
No, you may not use an individual member's personal bank account. 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 (as the IRS considers funds deposited into a personal account to be taxable income). 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 Leadership Initiatives does not manage accounts for student organizations.

Bank Signature Authority

Can we 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 not recommend that advisors serve as signers on a student organization bank account, nor handle organization funds. They do recommend that advisors regularly meet with the organization president and treasurer to ensure 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 that you keep the authorized signers current at the financial institution. If your signers leave town, you will experience a major delay in withdrawing any funds because financial institutions will have to go through certain procedures to change the signers on an account.

You cannot change the designations 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 your 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. You 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 who seek to bring recognition to Sam Houston State University via the participation in local, regional, state, national, and international student events, conferences, competition, etc. Refer to the [VPSA web page](#) to apply for the Student Affairs Travel Fund.

- **Campus Life Development Fund (CLDF).** This method of funding is also provided by the Vice President for Student Affairs, and 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 around. Refer to the [VPSA web page](#) to learn more about and apply for the CLDF.

- **Co-sponsoring Programs.** Co-sponsoring programs is often times 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.