Student Organizations Advisor Handbook

University of Wisconsin-River Falls

Created November 2007

Table of Contents

History of Student Organizations

"The history of student activities can be traced to the American colonial period, prior to the development of the first Greek letter organizations. Early student activities were based on religious themes and strong discipline. They evolved to include literary organizations, debating societies, and athletic clubs that organized social events, debates, or sporting contests."

Source: Advising Student Groups and Organizations by Norbert W. Dunke and John H. Schuh

Thanks for helping continue this great tradition!

Introduction	3
Role of the Advisor	4
Advisor Expectations	6
Tips for Advisors From Advisors	7
Liability/Risk Management	11
Funding	12
Fundraising Policies	13
Accessing Funds/Budgeting	14
WISDM	15
Frequently Asked Questions	16
On-Campus Resources	17
Where to Learn More	18
Sources	19

Introduction

All student organizations must have a UW-RF faculty or professional staff member as an Advisor. Having a campus advisor who is directly affiliated with The University of Wisconsin-River Falls provides the organization with the necessary connection to the University environment, policies and procedures.

The Advisor's role is to assist the organization in achieving its goals and objectives by providing a liaison between the University and the organization.

Some Advisors may agree to 'lend their name' in order that a club meets the Advisor requirement. By doing so, the Advisor fails to realize that by assuming the title they are also assuming responsibilities. The University expects the Advisors to inform club members and officers of relevant state laws and University policies and to take reasonable action to enforce them.

All Advisors must sign an 'Advisor Agreement Form' and be registered with the Student Organizations Coordinator in the Involvement Center.

Glossary

Campus Advisor: An UWRF staff or faculty member who assists a recognized student organization in achieving its goals and objectives by providing a working relationship between the University and the organization.

The Experts Say

"The true secret of giving advice is, after you have honestly given it, to be perfectly indifferent whether it is taken or not, and never persist in trying to set people right."

~Hannah Whitall Smith

Role of the Advisor

ADVISOR SELF-CHECK

Do you know the names of all of the members (or at least officers) of your organization?

Do you know where your organization keeps financial records?

Are you familiar with the procedures and activities of the organization?

Do you assist the officers in directing the organization instead of directing the organization yourself?

As the advisor, your primary duty is to serve as a role model and mentor. You have the opportunity to demonstrate skills in ethics, communication, organizational development, leadership, and more. Student groups should be run by student officers with guidance and assistance from their advisor. Here are a few key duties advisors can expect to fill:

1. Educator/Trainer – An advisor educates group members about the mission and purpose of the organization, and assists with training executive officers.

2. Resource Person – The advisor should be knowledgeable of campus and community resources including policies and procedures, how to reserve space, apply for funding, etc.

3. Source of Continuity – Advisors can provide the historical perspective that allows the group access to important information it needs to move forward, and can encourage the group to keep good records and preserve accurate files so there is a sense of history for future students.

Role of the Advisor

4. Fiscal Advisor – The Advisor may need to give advice on responsible fiscal management. Budgets and other fiscal matters should be voted on and decided by its constituents. Student groups should preserve their fiscal decisions in writing. It's helpful for advisors to be knowledgeable about issues concerning financial guidelines as well as the financial activities of the organization.

5. Confidant/Counselor – Student members may approach advisors with a variety of issues that are personal, academic, or organizational in nature. Students may also approach advisors with concerns about other group members. Advisors should provide objective options and appropriate referrals.

6. Group Dynamics/Conflict Mediator – Group members will not always see eye-to eye. Mediating conflict is an ongoing part of student group advising. While mediating is an essential advising component, it's important that you remain impartial. Be careful not to take sides, and know when to seek assistance from the Student Organizations Coordinator or other colleagues.

Advisor Expectations

Remember

Advisors are not expected to run organizations for students or help keep them active from year to year. The role of the advisor is to simply provide guidance.

Answering questions, sending students to the right people when you don't know the answer yourself, and providing mentoring advice are all that is expected of advisor.

If an organization seems on the verge of failure, it is not your duty to restore it. It is your duty to help an interested student to restore it.

Assist the group with reservations, contracts, and events that require University insurance.

- Assist your group with financial/account management and other fiscal needs.
- Educate the group on University of Wisconsin-River Falls policies and procedures, in particular those applicable to student groups. Help the student group navigate the policies.
- Know the Student Organization Handbook and the materials that accompany the handbook.
- Be aware of your group's operations, activities, and events.
- Attend as many meetings and events as possible while still maintaining balance. Burning out helps neither you nor your organization.
- Be active in goal setting with your student group.
- Teach students about leadership, organizational development, ethics, and other great transferable skills.
- Act as a role model and positive change agent.
- Act as the conduit between the group and the Student Organizations Coordinator as necessary.
- Remember that the group is to be initiated and controlled by the students and that you are there to assist in their experience.
- Have Fun!

Tips for Advisors...From Advisors

Tips for Success

Maintain a good rapport with the group while observing standards of professionalism.

Suggest, don't impose.

Work with the student leaders and help **delegate**. An advisor should not do the work for the student leaders.

Help ensure that the **group examines all sides** of an issue. Student leaders may need you to help them see differing viewpoints.

Have a relationship with the group that will **allow growth and development**.

Attend the group's meetings and programs whenever possible.

Treat members as individuals. It is important to get to know the students on an individual basis. An advisor should not assume the group attitudes, needs, issues, and personalities will remain the same year to year.

Communicate with members often.

Recognize that you may know more about leading than you know about advising. This imbalance could impact your advising style.
Our own personal leadership experiences frequently guide us into advising roles. Advisors often struggle with drawing the line between reliving our own wonderful leadership experiences and providing opportunities for students to have similar experiences. Understanding that our experiential background often outweighs our advising experiences can help us develop appropriate advising styles and allow students the chance to develop.

Keep your expectations of student leaders within the realm of reality.
Student leaders are not (yet) experts in their field. Also remember the first word in "student leader". Advisors can help student leaders develop skills that balance the many demands in their lives, both academic and "real world" related.

Bite and Count to 30.
Advisors can unknowingly dominate the conversation by offering suggestions. "Bite and Count to 30" means when you have an idea, thought, or suggestion, hold it for a count of 30. Student leaders are usually sharp, they just need a chance for the ideas to form in their minds. Give them time and allow the suggestion to be theirs.

Tips for Advisors...From Advisors

Tips for Success (cont.)

Be available and approachable for your group members. Have regular office hours or meeting times to ensure open communication.

Observe the effectiveness of leaders and members.

Help the group **develop a realistic plan** of action concerning goals/mission statement.

Know the group members and understand their needs.

Be committed to the group.

Provide appropriate **critical feedback**. Offer an evaluation of all programs and activities and encourage members to do the same.

Share in the group's success and failure. Help **guide** the group to success.

Know available resources and provide this information readily.

Meet with the executive board of the organization regularly.
This allows everyone the chance to stay informed and up to date. If nothing else, it also assists greatly in relationship development.

Recognize the students and their accomplishments.
Big recognitions, like "Of the Month" awards or other grand scale efforts, are great, but look for small ways to recognize accomplishments or successes on a more regular basis. Recognition is a good tool for motivating student leaders.

Actively teach student leaders.
Create "Educational Moments" Work with the President to organize training sessions, and be a model for teaching principles of leadership (perhaps things like integrity, trust, compassion, etc.). Give students a model that will benefit them beyond the scope of their organization. Show them how the skills they're developing will transfer.

Create "Hey Advisor, this is what I need from you" forms
Create a short form that organization members can fill out and give to you (related to academic issues, personal issues, organizational issues, etc.). Follow up with them on a regular basis regarding content.

Tips for Advisors...From Advisors

One on Ones

One on One meetings are very important in developing your relationship with the group officers and in helping to develop student leaders. Here are some suggested questions that you might use in your one on one meetings:

1. How are you doing academically?
2. How did you think the last meeting went? Any concerns or potential problems?
3. What are you thinking about for the next meeting?
4. What are some upcoming dates or programs that we need to plan for?
5. How are the other members of the executive board doing? Do you see any issues?
6. What are the group dynamics as you see them?
7. How is your progress towards your personal/ academic goals?
8. What are you learning from your position?
9. Are you having fun?

Support their activities
While balance in an advisor's life is often difficult to achieve, supporting your students will reap many benefits as the organization develops. Knowing that you are there, whether to help troubleshoot or just be supportive, will make your advising experience easier. If you miss events, try to miss those happenings later in the group's development.

Get to know them beyond their role as leaders.
Learn what's important to the students you are working with. Show that you care about them as individuals. Challenge yourself to really get to know everyone.

Challenge them in their academics.
Be "positively intrusive" about their academic lives. Find out what classes they're taking and how they're doing, and help them to understand the importance of balancing their academic, co-curricular, and personal responsibilities. If they question your intrusiveness, be tough and stick with them. You are an advisor to all aspects of their student leadership.

Have a full or mini-retreat. Focus the energy, set goals, work on transitions.
Understand that this does not have to be an expensive or major time-consuming venture. Invite them to your home or another place where they can separate themselves from campus life and focus on the organization. Work on team development, bonding, goal setting, etc. Think through the entire year, and stress that planning for an end of the year transition starts at the beginning of the year.

Tips for Advisors…From Advisors

Give them lots of information – keep them updated—no surprises from Advisor.
Students should be in the know about their environment and organization. Discuss complex issues or controversial proposals with your executive board in advance of presentation to the full body. Prepare them for these conversations and challenges so that they can act objectively and in the best interest of their group.

Let them make decisions.
Use executive board meetings as a place to offer ideas, but don't get involved in decision making if you don't have to. The views of an advisor carry weight and can quickly halt discussions among students.

Don't sit by the executive board at full organization meetings.
Spread yourself around and get to know the full membership of your organization. Listen to their thoughts and concerns, and show support for all members, not just the executive board.

Hang out after the meeting.
Enjoy and engage in the social aspects of your organization. There will often be questions that arise after the meeting that you can help answer. Presidents or executive members often like to process the meeting or get feedback on certain discussions. An advisor who always runs out at the sound of the gavel sends a strong message to the student leaders.

Liability/Risk Management

Tools for Success

Create a liability plan. Simply answer the following questions:

A. What is the activity that my organization is doing?
B. What are the risks associated with this activity?
C. How can these risks be minimized?
D. Who should be contacted in case of an emergency?

When you are all done typing or writing it up, review it with the leader of your organization. Sign it and file it away.

This simple plan can greatly minimize risks and help prepare for problems.

Want More Info?

Check out the UW-System Policy on Risk Management for Student Organizations
http://www.uwsa.edu/oslp/rm/manual/part_10/stdtorgs.htm

As an Advisor, you are liable for some of the actions of your organization. You agree to this liability whenever you sign an 'Advisor Agreement' form. The liability is very limited, however, as long as you are:

1. Aware of the activities of the group you advise and agree that the planned activities are safe and reasonable
2. Ensuring that all activities are within the mission of the University
3. Checking with the officers of your organization to make sure they are aware of any risks associated with their activities and are planning accordingly
4. Doing everything possible to limit risk
5. Checking with either the Student Organizations Coordinator or Risk Management Officer if you are unsure about the procedures for an activity

Funding

Remember

- All forms are available in the Involvement Center
- If you are interested in an Annual Budget, have your organization watch their mailbox in the Involvement Center...this is where the information is placed once the process starts
- There is no such thing as too much information...always include everything the committees might need to understand your request fully
- Funding training is offered annually for both Recognized Student Organization members and advisors; watch your email for more information
- Fundraising is a great option too. The Student Organizations Handbook is a great resource for learning about fundraising

Advisors play a large role in securing funding for organization activities. There are three sources of funding available for Recognized Student Organizations at UWRF. They are:

- **Base Funding:** Available to any organization that did not receive an annual budget; $25.00/semester given to organizations in Falcon Dollars to help defray copy costs

- **Single Event Funding:** Available to any organization that did not receive an annual budget; funds can be used for on– or off-campus events; currently a maximum of $1500.00/organization/academic year for travel expenses; no maximum for on-campus events

- **Annual Budgets:** Available to all organizations; a single request made once during an academic year for all funds necessary for the organization to operate for the upcoming academic year; requires submission of a proposed budget with an Annual Budget application; currently a maximum of $1500.00/organization/academic year for travel expenses; no maximum for other events

Fundraising Policies

KEEP IN MIND

If your organization needs "seed" money in order to conduct a fundraiser, they can apply for Single Event Funding (as long as they didn't receive an Annual Budget). At the conclusion of the fundraiser, the "seed" money must be paid back to the Leadership Development Programming Board (LDPB). Your organization will be allowed to keep the profits.

NOTE: If your organization does not raise enough money to cover the "seed" money, they will not be charged. LDPB understands the variable nature to the success of fundraisers and will absorb the loss if necessary.

Organizations like to do (and are encouraged to do) fundraisers. There is, however, oftentimes a large amount of confusion about what can be done and where.

What Can Be Done in the University Center?

1. Bake Sales (please reserve a table with Reservations first)
2. Sales of other items
3. Raffles (please start the process to do these at least 6 weeks before the event)

What Cannot Be Done in the University Center?

1. Hot Food Sales (without proper training)
2. Approaching students to ask for funds or to solicit them to attend events

Fundraising Ideas?

1. Service Fundraising (e.g. snow shoveling, leaf raking)
2. Silent Auctions
3. Dinners/Pancake Suppers/etc.
4. Creating and soliciting an alumni group from your organization

Check out http://www.fundraising-ideas.org/DIY/ for some great fundraising ideas.

Accessing Funds/Budgeting

LOCAL BANKS

Associated Bank
704 N Main Street
715-426-60660

First National Bank
104 E Locust Street
715-425-2401
(Also in the University Center)

M&I Bank
103 S 2nd Street
715-425-8131

River Falls State Bank
124 S 2nd Street
715-425-6782

S&C Bank
303 S Main Street
715-426-6577

Security National Bank
1561 Commerce Court
715-426-6600

WestConsin Credit Union
1207 N Main Street
715-425-8113

PROCUREMENT CARD INFO

http://www.uwrf.edu/purchasing/1procardintro.htm

If your organization receives an annual budget, that money will be transferred into a state account. You, as the Advisor, should have access to that account information via WISDM. Any costs incurred on-campus can be charged directly (oftentimes) to your organization account if you provide the account number.

You can also request a Procurement Card that is linked to your account. Procurement Cards act just like a credit card and allow your organization to make hotel and airline reservations, purchase things in stores and from online retailers, and register for events. The money to pay the “bill” for your Procurement Card will be taken from your account when you submit the proper paperwork to the Accounts Payable Office.

If your organization does any fundraising or collects dues, it is not recommended that you place these funds in your state account. Setting up a separate checking account with one of the local banks makes your money more accessible and allows you to spend money on things that are restricted by state funding rules such as food, alcoholic beverages and personal items.

WISDM

Quick Reference

You can log into WISDM at: https://authhub.wisconsin.edu/?app=WISDM

All account numbers for student organizations are six digits long and begin with 826

Logging in only requires your Falcon ID number and password

Once you become an advisor, you should be given access to WISDM for your organization. If not, contact the Student Organizations Coordinator

WISDM (Wisconsin Data Mart) is the program that contains all of the account information for organization that have accounts with the state. These records are held at the UW System level, though they are managed by individuals on-campus. Any time an organization receives an Annual Budget, that money is placed in their WISDM account.

Advisors should have access to WISDM accounts so they can track funds for their organization. The organizations account number in WISDM is the one that should be put in the 'Account' column of the 'Travel Expense Report Form' when requesting a reimbursement for an organizational event.

If your need for access to your account is occasional, or is mostly used within the University itself (to reserve rooms, etc.) then simply keep track of the number. The Accounts Payable office can issue checks from your account if you authorize it and provide the account number. You can also, oftentimes, simply inform the on-campus party who is charging the fee and they can deduct the money directly.

Frequently Asked Questions

Have a Question?

Email it to the Student Organizations Coordinator at jonathan.m.levendoski@uwrf.edu

He will answer your question within one business day. If it is relevant to all organizations, the answer will appear in the bi-weekly email to advisors.

Not Getting the Emails?

Let the Student Organizations Coordinator know. He can add your email address to the list so you can stay up to date.

When should I rely on my State Account and when should I consider getting a private account for my organization?

State accounts are automatically created for you if your organization receives an Annual Budget. They are usually sufficient to do large events.

If your group has frequent small expenses (for meetings or series events) or does a large number of small fundraisers (bake sales) or fundraisers that last all year, I would recommend a private bank account because the money is more accessible than it is in a state account.

Is my organization tax-exempt?

No, student organizations are not tax-exempt through the University of Wisconsin-River Falls.

What should I do if I am upset about the cost of room reservations in the University Center?

In addition to writing and enforcing policy and keeping track of all of the information related to Student Organizations, one of the jobs of the Student Organizations Coordinator is to advocate for change that will benefit organizations. Write a letter, get it signed, make sure it is specific (with examples) and drop it off in the Involvement Center. The more information available, the easier it is to get changes made.

Can I travel with my organization?

Yes! As a matter of fact, we encourage it. Unfortunately, however, policy states that Segregated Fees (which is what is given to Student Organizations) cannot be used to fund advisor travel or advisor workshop expenses. Look to your department for assistance.

On-Campus Resources

Student Organizations Coordinator
(send all questions, comments, and concerns here first)
jonathan.m.levendoski@uwrf.edu
715-425-4444

Risk Management Office
715-425-3232

Public Safety Office
715-425-3133

Accounts Payable Office
http://www.uwrf.edu/accounts-payable/

Campus Reservations
reservations@uwrf.edu

Fleet Services
http://www.uwrf.edu/facilities-management/fleetvehicles.html

Where to Learn More

DON'T KNOW WHERE TO LOOK?

This is not, by any means, an exhaustive list of policies. If you have a questions and cannot seem to find the answer, don't spend your entire day looking. Email the Student Organizations Coordinator. There is a good chance he knows the answer or at least can find out the answer.

Alcohol Beverages on Campus: http://www.uwrf.edu/administration/policies/ad_pol/adpol40.html

Administrative Policies: http://www.uwrf.edu/administration/policies/ad_pol/administrative.htm

UWRF Implementation of 36.09(5) which governs the structure of student governance: http://sa.uwrf.edu/student-senate/documents/wisconsin-statute-36095-implementation.pdf

University of Wisconsin System Policy Paper F20 which governs the appropriate and inappropriate use of Segregated University Fees (SUF): http://www.uwsa.edu/fadmin/fppp/fppp20.htm

Travel Expense Report Form, which allows for the reimbursement of travel expenses from a state account: http://www.uwsa.edu/fadmin/document/sfster07-1.xls

Student Handbook: http://www.uwrf.edu/policies/

Sources

THE EXPERTS SAY

"In giving advice seek to help, not to please, your friend. "
~Solon

Advisor Guide for Student Organizations. William Paterson College.

Boersig, Pam, "The First Advising Position" from the book Advice to Advisors

Buck, J. & Erschen, P. (1997). "Beyond Advising."

"Blueprints for Building a Successful Organization" A Guidebook for Student Organizations 1998/99", available through Student Life Programs

Dunkel, Norbert W. and Schuh, John H. *Advising Student Groups and Organizations*. San Francisco: Jossey-Bass, 1998.

Mi Yoon, Han. "Advising Student Organizations: What Is It That We Do?" Campus Activities Programming, March 1996.

Oxendine, Butch. "Searching for the Perfect Advisor", Student Leader, Spring 1996.

The Purdue University Student Activities Office

Student Organization Advisor Handbook. University of Central Florida.

The University of Minnesota Housing & Residential Life Staff

West Texas A&M University Student Organization Services Handbook. 1997, revised 1999.