Advisor Training
Overview

• Purpose/Procedure
• Roles of the Advisor
  • Event Planning
  • Finances
  • Clery Act
Purpose/Procedure for Advisors
Purpose

To encourage positive interaction between teaching and administrative staff, each student organization is required to have an advisor.

An advisor must be selected from full-time faculty or staff members at USCB.

The Director of Student Life will assist organization in securing advisors, upon request, and will assist advisors with questions concerning their organizations.
Procedure

A. For Appointment:
   A. To signify their willingness to serve as an advisor to a student organization the Advisor Confirmation Form must be completed and submitted. This demonstrates the support of the advisor and the advisor’s supervisor/department chair.
   B. The advisor must complete and resubmit the Advisor Confirmation form when the student organization re-registers each year.
   C. Should an advisor step down from his or her position at any time during the year, the Office of Student Life should be contacted immediately, and a replacement acquired within three weeks.
Procedure

A. For Advising:

1. Complete any and all requirements set forth by the Office of Student Life (i.e. trainings, workshops, etc.) as referenced within the student organization handbook.

2. Become familiar with, understand, and advise the organization to abide by all university policies and procedures.
3. Act in an advisory capacity, as opposed to a directive relationship in the organization through frequent interactions with the officers and members. The following education functions are cited as examples:

a) Providing the officers with the elements of good organizational practice.

b) Teaching the techniques and responsibilities of leadership and following.

c) Teaching the principles of effective group operations.

d) Developing procedures and plans for actions.

e) Keeping the group focused on its goals.

f) Developing self-discipline and responsibility in the group, and stimulating and initiating activity.
4. Sign or co-sign appropriate University forms, such as those for use of campus facilities, purchase orders, travel requests, or the registration of visiting speakers or lecturers.
5. Act within the scope of your authority.
6. Be available to the officers and members to share ideas about organization affairs.
7. Meet with the officers of the group to discuss the progress and direction of the group.
8. Have a discussion with the group related to meeting attendance.
9. Advise and consult with the organization and its officers in its financial affairs to see that the proper budgets are formulated and that the proper distribution of and accounting for funds of the organization are maintained. 
   a) For non-funded organizations, provide financial and budgetary advice.

10. Approve/co-approve off-campus activities in which students represent the organization, such as meetings, conventions, etc

11. Serve until successor is appointed, if for any reason it is impossible to continue as advisor to the organization.

12. Contact the Director of Student Life when questions or problems arise.
Roles of the Advisor
Roles of the Advisor

An advisor represents many roles for the student organization.

They must serve as:

• Mentor
• Team Builder
• Communicator
• Motivator
• Reflective Agent
• Financial Supervisor
• Policy Interpreter
Roles of the Advisor: Mentor

As the mentor, the advisor is expected to:

- **Give time**
  - The student is looking to an advisor to help them understand their role within the organization and the campus. Give time to allow them to utilize the experience the advisor has and build relationships with their advisor to help them gain understanding of the university.

- **Role Model**
  - The student looks to the advisor as an example of professionalism. They are also looking for the advisor to challenge them in their roles and to demonstrate healthy work/life balance for them to imitate in their own future roles.
Roles of the Advisor: Team Builder

As the team builder, the advisor is expected to:

• Once a new executive committee or board is appointed, the advisor is expected to help them begin to bond
  • This helps them to work more effectively together and establishes connections within the group.

• When possible, spend informal time with members of the organization.
  • This allows for bonds to be formed within the group and between the student and the advisor. (Meals are great for this.)

• Advisors can help with leadership development.
  • As you work with building the team, the advisor can help in identifying and developing the personal leadership skills of the student. This also helps in identifying the potential for new leaders within the organization.
Roles of the Advisor: Communicator

As the communicator, the advisor is expected to:

• Manage Conflict
  • Working with people, conflict is inevitable. The advisor can help students learn how to mediate and solve conflict within the organization in order to keep a healthy group.

• Go-Between
  • The advisor stands as an advocate for the organization between the students and administration when needed. They straddle the line between the two and help with the communication between them.

• Manage the Old and New
  • As an organization grows, the advisor helps to clarify the goals and expectations of the past and serves as a bridge between older and new members. The advisor tends to be a constant in the organization.
Roles of the Advisor: Motivator

As the motivator, the advisor is expected to:

- Recognition
  - We all want to be recognized for the work and time we spend on our work. The advisor helps by giving recognition and praise within the organization for the work of the students.

- Encourager
  - As the students get into the process of the student organization work, they will need to be encouraged to persevere. Plan ways to keep them encouraged whenever they run into a block.
Roles of the Advisor: Reflective Agent

As the reflective agent, the advisor is expected to:

• Evaluate
  • As a member of the university, the advisor is aware of how important it is to evaluate the work that is done. The advisor should help the organization evaluate how they are doing in meeting their goals and how the activities they are doing accomplish their goals.

• Learning Experience.
  • The advisor should also reflect on whether they are aiding the organization in being an effective learning experience. The advisor can help ensure the organization is effectively teaching the students and serving them in their goals.
Roles of the Advisor: Financial Supervisor

As the financial supervisor, the advisor is expected to:

• “Treasurer”
  - The advisor should assist and keep records of the expenses of the organization. They should work closely with the treasurer to ensure the organization remains in good financial health.

• Account
  - The advisor should also keep good account of what is in the organization’s account in order to help the treasurer track expenses. This helps the organization know what is been processed and what has not and keeps from any financial errors.

• Budgeting
  - For many of the students, budgeting can be a new experience. Assist the organization in creating and maintaining a budget to keep them on task.
Roles of the Advisor: Interpreter

As the interpreter, the advisor is expected to:

• Organizational Level and University Level
  • As stated in on the communicator slide, the advisor helps to serve as a go-between for the organization and university. As the interpreter, the advisor helps the organization and the university understand the language of the other. The advisor helps interpret the roles or expectations between the two.

• Student Conduct
  • The advisor helps the organization understand their student conduct role and helps them to remain in good standing in their activities. This allows the organization to remain in good standing at the university level.
Event Planning
Event Planning

Though the students in the organization should do the planning for events, it is important, as the advisor, that you understand the steps that go into making a successful event happen on campus in order to help them in this process.
Step 1
As an organization, brainstorm and select ideas for programs to host on campus.

Step 2
Know what the purpose of the event is and know how it helps accomplish the goals of the organization.

Step 3
Submit all the necessary paperwork to reserve spaces and equipment. This helps create a guide to follow in planning process.

Step 4
Arrange an advertisement plan that reaches your target audience. Be sure it includes location, time, date, and some type of eye-catching detail.
**Step 5**
Within the week of your event, make sure all speakers, volunteers, and reservations are confirmed.

**Step 6**
Know the set up and take down times for your event and who is to arrive for both. Also, have some type of final push for advertisement.

**Step 7**
De-brief following the event as an organization.

What went well? Could be changed?
Make sure any thanks is sent to outside speakers or volunteers.
Please see the Student Organization Manual for more in-depth questions about aspects of event planning.

<table>
<thead>
<tr>
<th>Reference Pages in Handbook</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Spending Procedures</td>
<td>p.19</td>
</tr>
<tr>
<td>Purchasing Goods</td>
<td>p.19</td>
</tr>
<tr>
<td>Procurement Procedures by Dollar Value</td>
<td>p.21</td>
</tr>
<tr>
<td>Food Policy</td>
<td>p.22</td>
</tr>
<tr>
<td>Speakers</td>
<td>p.22</td>
</tr>
<tr>
<td>Service-Related Expenses/Contracts</td>
<td>p.24</td>
</tr>
<tr>
<td>Catering</td>
<td>p.25</td>
</tr>
<tr>
<td>Performers</td>
<td>p.25</td>
</tr>
<tr>
<td>Request to Reserve the Student Lounge</td>
<td>p.26</td>
</tr>
<tr>
<td>Space Request Form and Rental Agreement</td>
<td>p.27</td>
</tr>
<tr>
<td>USCB Student Social Event Policies</td>
<td>p.27</td>
</tr>
<tr>
<td>Campus Posters/Publicity Policy</td>
<td>p.28</td>
</tr>
</tbody>
</table>
Finances
Organizations that serve a special interest student population such as organizations for minorities, veterans, women, disabled, and international students are eligible for general funding providing the membership is open to all students.

The following slides will describe how the allocation is determined, account information, and restrictions on fund use.
The Finance Committee will give priority to the allocation of funding based on the following criteria:

1. Size of Organization
   a. The number of students served by the organization's activities.
   b. The number of students participating in the organization.

2. Activities
   a. The number and scope of the services provided.
   b. General or educational value of the programs/events or service provided to the student body.
3. Past Use of Allocated Funds
   a. A comparison of the approved budget with previous years' budgets.
   b. Economical use of past funds.
   c. Past and expected future performance of the specific program/event.

4. Discrimination
   a. The organization does not discriminate based on race, religion, sex, creed or national origin.

5. Other
   a. Contribution to University's image.
   b. Contribution in the form of special or unique serve (especially communications).
All student organization accounts are designated as "D" accounts, which identify the source of revenue as activity fees. Also, some "D" accounts generate revenue by sales, raffles, fees, etc.

Printed reports with budget information and expenditures are sent every quarter. At that point, if there is any discrepancy, a memorandum to the Business Office should be completed to receive more information on the charge or correct it.
Accounts

Unused funds allocated to the organization at the end of the Spring semester shall be removed from accounts by the Business office at the direction of the Vice Chancellor for Student Development for reallocation the following Fall, unless the president or the advisor of the club submits a surplus balance budget proposal designating the use of the funds to the Director of Student Life by 5 pm on April 15.
Fund balances will carry over from one fiscal year to the next, only if the funds are income from raising effort. Likewise, deficits will carry over for the organization to make up.

Before depositing/collecting funds or invoicing services, the treasure of the organization must meet with the Business Office about the best means of having these funds dispersed.
Restrictions on Student Fund Use

Student Services Fees shall not be used:
- To purchase alcoholic beverages
- To fund academic journals
- For any type of political or religious donations
- By an organization for investment purposes
- To pay for individual memberships or private lessons
- As contribution to charitable organizations in any form or manner.

(An organization can sponsor a fundraising event for this purpose.)
Restrictions on Student Fund Use

"D-funds" may be used to fund fundraising events for scholarships and charitable awards, but clubs cannot use "D-funds" for scholarship directly.

All funds collected must be receipted through USCB. No funds may be used until deposited and filled out an intention to spend form. No organizations may have a separate bank account.

Stipends and travel expenses must be itemized and submitted within budget proposal.
Restrictions on Student Fund Use

Funding for the following expenditure areas shall be limited as follows:

1. Funds requested for travel may not exceed the level of funding matched by the organizations own fund-raised budget for the trip.

2. Food for regularly scheduled meeting shall not be funded. An exception may be made for food functions that are an integral part of an organization's program, such as Health Fair, Rest and Re-Energize, etc.

3. Clothing or gear of a personal nature shall not be funded. Re-usable gear, T-shirts that promote the university and clothing for athletic events may be purchased.
Please see the Student Organization Manual for more in-depth questions about aspects of finances.

<table>
<thead>
<tr>
<th>Reference Pages in Handbook</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority of Funding</td>
<td>p.15</td>
</tr>
<tr>
<td>Account Structure</td>
<td>p.16</td>
</tr>
<tr>
<td>Prohibited Uses of Student Funds</td>
<td>p.17</td>
</tr>
<tr>
<td>Restrictions on Uses of Student Funds</td>
<td>p.17</td>
</tr>
<tr>
<td>Unused Carry-Over Funds</td>
<td>p.18</td>
</tr>
<tr>
<td>Fund Balance</td>
<td>p.18</td>
</tr>
<tr>
<td>Ticket Sales</td>
<td>p.18</td>
</tr>
<tr>
<td>Forfeiture of Funds</td>
<td>p.18</td>
</tr>
<tr>
<td>Depositing and Collecting Funds</td>
<td>p.19</td>
</tr>
<tr>
<td>Invoicing</td>
<td>p.19</td>
</tr>
</tbody>
</table>
Clery Act
Clery Act Compliance for Advisors

Campus Security Authorities (CSAs)
• Includes anyone with significant responsibility for student and campus activities
• Examples: Advisors to Student Organizations and Study Abroad Program Leaders
• CSAs have responsibility to report crimes for inclusion in crime statistics and crime log
• Contact Erik Salus, Lieutenant and Clery Compliance Administrator with DPS, at esalus@uscb.edu with any questions about reporting.
Questions?

Contact the Director of Student Life with any further questions at uscblife@uscb.edu.