ADVISOR MANUAL

for Student Organizations 2022-2023

WORCESTER STATE UNIVERSITY

One of the most common theories used in higher education today to explain the steps of adolescent development is Chickering's Seven Vectors. Each step of this theory is evident in our students, from freshmen year to their senior year. As advisors, it is important that we are aware of these steps and we should adjust our advising style based on the step that each student is currently at.

Building on the work of Erickson and others, Chickering (1969) formulated his theory of adolescent development. Viewing the major areas for development as vectors which possess both magnitude and direction, Chickering identified seven key components to development.

1. Achieving Competence. There are three key aspects to developing a sense of overall competence: (a) intellectual, (b) physical and manual, and (c) social and interpersonal. The advisor may observe-a student is not just a good leader; the student may be a skilled motivator. A good problem solver, creative with ideas but weak in understanding budgets.
2. Managing Emotions. Students seek self-control and the confidence to know their behavior will be consistent. Specifically, they must manage aggression and sex as major impulses. The advisor may observe-a student whose ideas were rejected in the last meeting may be angry and talk about quitting the group. A freshman student is awed by a senior member but manages to disagree with the senior gracefully.
3. Becoming Autonomous. The foundation of this vector is the "independence of maturity." The student is seeking both emotional independence (diminishing the need for outside approval and trying to win favor and be liked) and instrumental independence (being able to overcome one's own problems without continual help, including financial support). The culmination of autonomy is the awareness and acceptance of interdependence as a desired state. The advisor may observe-a student disagree with a proposed hazing practice and speak s out against group sentiments or a committee chair finally holds a meeting without needing to review every specific item on the agenda with the advisor.
4. Establishing an Identity. This vector builds on the developing sense of competence, autonomy, and the management of emotions. The solidification of the inner sense of self is further enhanced by the acceptance of physical appearance, a sense of personal style, and sexual identity. The advisor may observe – a female chairperson of an all-male leadership. The member who comes to an event inappropriately dressed, and instead of fleeing in embarrassment, stays and jokes about his error.
5. Freeing Interpersonal Relationships. With the acknowledgment of interdependency and identity, the student is more able to appreciate the enrichment of diverse relationships. Awkward relationships or intolerance towards others due to difference in age, sex, race, and other characteristics are welcomed and even warm relationships develop. With a sense of personal identity, the student finds advisors and even parents becoming real people and potential friends. The advisor may observe – a young, single student stops to chat with an older, married student after the meeting. The white social chairperson proposes that several of the social events planned (dances, music, films) must specifically appeal to African American students.
6. Clarifying Purpose. As skills and relationships develop, it is important to clarify how these elements will fit into the student's future. What career, hobbies and planned family relationships will be part of the future? The challenge of this vector is to effectively integrate seemingly incompatible goals. The advisor may observe – a male pre-med student selects a medical specialty that will give him time for the family life he desires. The student declines a nomination for president because she knows she already has many obligations for next year with a senior essay projects and responsibility as a resident assistant.
7. Developing Integrity. Building on purpose and identity, the development of integrity is "the clarification of a personally valid set of beliefs that have some internal consistency and that provide at least a tentative guide for behavior: (Chickering, 1969, p. 17). The student must personalize and integrate values. The desired goal is behavior congruent with values. The advisor may observe – a student who values a sense of responsibility does a shift on the cleanup committee although the student is getting a cold. A member observes the treasurer pocketing $5.00 from the cash box and immediately asks the treasurer to explain that action instead of letting it pass or telling someone else to handle the issue.

ADVISOR MANUAL
for Student Organizations

Dear Faculty or Staff Member,

Congratulations on being selected as a student organization Advisor for this year! Each year the students in your organization choose an Advisor to assist them in working with their group, as well as provide guidance and support throughout the year. It is a privilege to be chosen by a student organization to serve as an Advisor, and your role in the organization is crucial to the success of both the student group as a whole and its members.

This manual was developed to assist you in working with your student organization throughout the academic year. In addition to *Synergy,* the handbook given to all Advisors and student leaders, this manual will give you specific information on topics such as program planning, budgeting, fundraising, and more. We hope that this tool will not only assist you in advising your organization, but will also set up a plan for success for the organization and its members.

This manual also includes an Advisor Expectation Checklist. We encourage you to sit down with your student members and fill out the checklist together to assist you all in developing a great working relationship for the upcoming year.

If you have any questions or concerns regarding any information in this manual, or *Synergy,* please feel free to contact our office. You are also encouraged to set up an appointment to meet with your organization's Program Coordinator to have all questions answered. Many resources can also be found online at **lead.worcester.edu**.

Thank you for your support of co-curricular activities at Worcester State University and the development of our student leaders.

Sincerely,

Kristie McNamara
Director, Office of Student Involvement and Leadership Development

Sarah Potrikus
Assistant Director, Office of Student Involvement and Leadership Development

Linzy Martinez
Assistant Director, Office of Student Involvement and Leadership Development

The Office of Student Involvement and Leadership Development (OSILD) believes that Advisors can and should play an active role within their student organization. We also acknowledge the right of each student organization to select Advisor(s) that they believe will be a good fit for the organization and will contribute to its success. Most student organizations that are consistently successful have active Advisors working collaboratively with the members of the student organization. We encourage Advisors to become involved and be as active as possible while allowing the students the freedom to make their own decisions. We believe that Advisors should teach and advise, but decisions should be made by the student members of a student organization. Students benefit greatly from interaction with faculty and staff outside of the classroom and we see the Advisor role as one of the best ways to encourage interaction.

Our role as Student Involvement professionals is to work with students and Advisors to help their organizations succeed and accomplish their goals. We can often help both the student members and the Advisor(s) navigate through the University policies that can sometimes seem daunting, as well as offer our professional advice regarding successful event planning. While we help in these ways, we are not there to supplant or replace an Advisor. Our hope is that our staff can encourage successful Advisor/student relationships that will lead to greater successes for our student organizations.

Mission
The Office of Student Involvement and Leadership Development provides a comprehensive co-curricular student experience through leadership development, involvement opportunities, and a diverse array of social, cultural, and educational programs for the entire Worcester State community. All of our programs challenge and encourage students to become empowered, inclusive, and knowledgeable future community and global leaders.

Vision Statement
To be the primary campus resource in student leadership development programs and known for providing immersive campus experiences that allow students to build their interpersonal abilities and develop real-world skills.

Core Values
The work of the Office of Student Involvement and Leadership Development is guided by the following values:
• **Student Development** and learning happens both in and out of the classroom, and programs seek to help students make connections between their academics and real world applications
• **Empowering** students to be resilient and teach them how to advocate for themselves and those around them through programs and trainings
• **Leadership** is accessible to all students, and only through shared experiences can students learn to both improve their leadership style and appreciate those of others
• **Mutual Respect** of all students, staff, faculty, and community members is key in establishing an environment of inclusiveness, understanding, and the sharing of ideas

THE ROLE OF THE ADVISOR

Advisors should be an integral part of every student organization. Often they have been affiliated with the organization longer than any of the current officers and can offer a valuable historical perspective as well as knowledge for navigating OSILD policies and procedures. Most importantly, and Advisor advises the organization on what they goals and direction should be; they will work closely with their students to improve both the organization and the student's leadership abilities.

It is important that an Advisor is an active participant in the organization, attending meetings and events when available and providing support to their students, especially the organization's officers. A good Advisor will offer suggestions and a different perspective throughout the year without making decisions for the organization.

The staff in OSILD feels strongly that an Advisor should not only be approached for a signature, or that they should be the guiding voice within the organization. Rather, they should provide opportunities for their students to lead and grow among their peers while providing direction and advice.

ADVISOR SPECIFICS
• Be informed of the purpose and programs of the organization
• Be an individual of sincere interest and concern for students and their growth
• Assist the organization in its attempt to fulfill its goals
• Attend all meetings and supervise events scheduled/sponsored by the group
• Discuss and clarify your role as the Advisor with the group members to avoid problems due to misunderstandings regarding roles and responsibilities
• Maintain familiarity with the policies and procedures of OSILD and Worcester State University
• Maintain contact with OSILD
• Be aware of the leadership training opportunities provided by OSILD and encourage members to attend, especially Budget Workshops and Event Planning Training
• Be available to club officers of the organization on a regular basis
• Be reasonably available to members to advise and assist in organization issues or problems
• Promote involvement and discussion amongst group members
• Provide positive feedback and constructive criticism to group members
• Encourage support from and participation by colleagues in various club activities
• Discuss all contractual agreements with OSILD Program Coordinator assigned to the student organization
• Provide advice and counsel on proper procedures and guidance to avoid conduct that would discredit Worcester State University
• Advise through the process of challenge and support; recognize that failure is as much of a learning process as is success in many instances
• Encourage members to gain useful and valuable experience from their participation in activities, but not at the expense of their academic responsibilities

ADVISOR EXPECTATION CHECKLIST

This checklist is to help determine the role and expectations of the Advisor, and should be reviewed with organization officers and the Advisor. Together, rate each expectation on a scale of 1 to 3.

1 = No expectation
2 = Little expectation
3 = Definite expectation

Expectations for Advisor

___ Attend all general meetings
___ Attend all executive board meetings
___ Call meetings of the executive board when they believe it is necessary
___ Explain University policies, when relevant to discussion, to officers and general members
___ Be aware and knowledgeable about the budget process
___ Be aware and knowledgeable about the event planning process
___ Attend all group activities, programs, and events
___ Reserve an appointment with the organization President each week
___ Reserve an appointment with the officers each week
___ Help the president prepare an agenda for each meeting
___ Speak up during discussion when they have relevant information
___ Speak up during discussion when they believe the group is likely to make a poor decision
___ Encourage students to make their own decisions rather than have them constantly look to them to make decisions
___ Take an active part in the transition of new and old officers following elections
___ Take initiative in establishing an environment of teamwork and cooperation
___ Be familiar with University facilities, services, and procedures that affect group activities
___ Keep the official files in their office
___ Inform the group of infractions of their bylaws, codes, standing rules, and Charter
___ Recommend programs, speakers, services, vendors, and more
___ Let the organization work out its problems including mistakes and "doing it the hard way"
___ Do not intervene unless asked to do so
___ Cancel any activities when they believes they have been inadequately planned after consulting
     with the organization
___ Mediate interpersonal conflicts that arise
___ Be responsible for planning leadership skills workshops
___ Represent the organization in any conflicts with members of the University staff
___ Keep the organization aware of its stated objectives when planning events
___ Let the group thrive on its merits; do not interfere unless requested to do so
___ Get a copy of all official correspondences
___ Check all official correspondences before they are sent
___ Have access to all organization paraphernalia, records, and equipment during breaks or times of transition
___ Take an active part in creating and forming the organizations goals

Other Items of Discussion

The suggested topics below should be discussed with the organization and the Advisor. The conversations prompted by these topics help open up communication between the officers and the Advisor, as well as initiate a stronger working relationship.

• I want my advisor to be…
• Meeting with my advisor should be…
• When I have a concern or a problem related to my organization I expect my advisor to…
• My advisor's role in our group meetings should be…
• My advisor's role during programs and events should be…
• My advisor can help our organization grow in the following areas…
• Our relationship with our advisor should be…

ANNUAL CHECKLIST FOR STUDENT ORGANIZATIONS

Below is a helpful task list to give you an overview of what student organizations should be doing throughout the year. Use this to guide conversations with your student organization and to help them stay on track.

Weekly/Monthly Things To Do
• Check club email account if you have one
• Check your own personal email for weekly leadership emails from our office.
• **Advisors** – You will also get these emails so please read as they include helpful reminders, important deadlines, and information for upcoming events
• Check club mailbox in OSILD

August
• Read the summer leadership newsletter to help you get ready for the upcoming year
• Publicize your club by making new general club banners and flyers to advertise first meeting
• Complete paperwork and forms for September events and turn into OSILD
• Sign up for Club Kick Off and prepare table
• Develop a recruitment plan
• Check club mailbox for important information
• Finalize planning for Family Day/Homecoming if participating
• Determine any event date and/or space changes and speak with your Program Coordinator

September
• **Advisors and Officers** - Nominate students for the fall Emerge Leadership program
• Complete Club Registration Form
• **Special Interest Groups** start the re-recognition process with Student Senate
• Attend Budget Workshop and Event Planning Training (EPT) as needed
• **Advisors** – Attend Advisor Lunch
• Participate in Club Kick Off and Welcome Week activities
• **Major Organizations** – submit a key list for club offices and/or closet to OSILD if applicable
• Meet with Program Coordinator for initial semester meeting
• Complete paperwork and forms for October events and turn in to OSILD
• Plan for and attend Family Weekend and Homecoming events
• Vote in the SGA Elections
• Designate a member of your organization, preferably the President/Chairperson, to attend the monthly Executive Leadership Council Meetings

October
• Attend Budget Workshop and Event Planning Training (EPT) as needed
• Complete paperwork and forms for November events and turn in to OSILD

November
• Complete paperwork and forms for December events and turn in to OSILD
• **Advisors and Officers** - Nominate students for the spring Emerge Leadership program

December
- Pay all bills before leaving for winter break
- Complete paperwork and forms for January and February events and turn in to OSILD
- Sign up for the Leadership Summit
- Assist club officers in collecting names for a member roster to be submitted to OSILD prior to the end of the semester

January
- Meet with Program Coordinator to discuss space updates for spring semester
- Pay any bills that may have come in over the winter break
- Complete paperwork and forms for February events if not done already and turn in to OSILD

February
- Attend Budgeting Workshop and Event Planning Training (EPT) as needed
- **Major Organizations** – Prepare budget for the Senate Budget Hearings and complete your budget packet
- Complete paperwork and forms for March events and turn in to OSILD
- **Major Organizations** - update key list if you have new members
- **Advisors and Officers** – Nominate a deserving senior for the Ella May Whitney Award
- Last chance for your organization to be re-recognized for this academic year if you have not done so already (deadline is March 1st)
- Last chance for any additional allocations requests to be submitted to Senate (deadline is March 1st)

March
- **Major Organizations** - turn in Budget Request to Senate.
- Hold elections for officers for the next academic year and submit list to OSILD
- Officer training for newly elected officers should begin
- Complete paperwork and forms for April events and turn in to OSILD
- Last chance for any line transfers for a Major Organization budgets (deadline is April 1st)
- Submit award packet for All Org Banquet
- **Advisors and Officers** - Nominate students for the Outstanding Student Leader Award

April
- Submit club roster for All Org Banquet list and have members sign up at the OSILD desk
- Vote in the SGA Elections
- Submit Summer Contact List to OSILD
- Complete paperwork and forms for May events (if any) and turn in to OSILD
- Assist club officers in collecting names for a member roster to be submitted to OSILD prior to the end of the semester

May
- Attend All Org Banquet
- **Major Organization Officers** - Turn in keys to your club office/closet before leaving for summer
- Pay any bills remaining before leaving for summer
- Attend Planning Calendar Meeting to reserve dates and space for next academic year

Additional Allocation—Any active student organization can petition the Student Senate for additional funding for events throughout the year. Deadline for submission is March 1st.

Budget Request—Every spring, Major Organizations may turn in a funds request for the following year to the Student Senate. The Student Senate then decides on funding requests for each organization. Budgets are due in mid-March.

Budgeting Workshop—All Treasurers are required to attend a Budgeting Workshop, where they will learn about policies and procedures related to organization finances. A student organization cannot use their allocated budget or line 99 fundraising account until the treasurer for the organization has attended the training.

Event Planning Training (EPT)—Event Planning Training (EPT) is required for all student organization members who wish to be a part of the event planning process and become a Student Coordinator. It is held multiple times throughout the year. Students only need to attend once.

Executive Leadership Council (ELC)—Executive Leadership Council is held four to six times a semester, and is an opportunity for members of all recognized organizations to meet and discuss upcoming events.

Key List—A key list is a list of members who have access to the key(s) for your organization's office and/or closet in the Student Org Suite.

Kristie's Weekly Leadership Email —This weekly email includes helpful reminders and deadlines for all officers of student organizations and Advisors.

Major Organization—A Major Organization is an organization that has existed for over two years, and whose purpose and activities appeal to a large number of students. Major Organizations have larger and more detailed budgets to use throughout the year.

Office Of Student Involvement & Leadership Development (OSILD)—OSILD is located on the second floor of the Student Center, and is where you can find your organization's Program Coordinator, the Wall of Forms, and organization mailboxes.

Org Suite—Located on the third floor of the Student Center, the Student Organization Suite is the home of a large work room, conference room, organization offices, and storage closets. The conference room can be booked by your student organization for club meetings only, and the large work room is available for use throughout the day.

Planning Calendar—The Planning Calendar provides an overview of all events for the upcoming year. It is a great resource for choosing dates and locations for your organization's events. A copy can be found at **lead.worcester.edu**.

Program Coordinator—Your organization's Program Coordinator is a staff member in OSILD, and is available to meet with you throughout the year and help with event planning and address any questions that you may have. Your students should always meet with them to review upcoming events and submit an Event Clearance Form.

Resource Room—Located on the first floor of the Student Center, the Student Organization Resource Room is available for student organizations to make flyers, posters, and banners, as well as make quick copies. There are also limited arts and craft supplies for members to use for publicity and a resource library for student leaders.

Special Interest Group—A Special Interest Group is an organization whose purpose and activities appeal to a limited number of students. All groups must be a Special Interest Group before becoming a Major Organization. They are automatically allotted $500 per year for events and programs, and must be re-recognized each year to receive funding.

Student Coordinators—Once a member of an organization has been through EPT they are now a Student Coordinator, and can complete event paperwork and call vendors to request contracts.

All Org Banquet—This banquet is held at the end of the spring semester in appreciation to all student organizations for a great year of programming. Each organization is able to recognize their own members through awards and gifts. The Outstanding Student Leader Award is also given out at this banquet.

Chandler's Challenge—Chandler's Challenge is Worcester State's annual days of giving. In this exciting two-day bracketed-style event, official student clubs, academic departments and centers, and athletic teams will go head-to-head to see who can get the most donors to support their cause. Winning teams will be awarded cash prizes.

Club Kick Off—Held at the beginning of the fall semester, the Club Kickoff is a large fair where students can learn about all the available organizations and clubs can recruit new members. Student organizations receive signup information in August.

Emerge Leadership Program—The Emerge Leadership program is designed for any emerging leader regardless of their class year. Emerge is a seven-week workshop program held each semester to help students build their foundational leadership skills while developing a personal leadership philosophy.

Family Day—Held in the fall semester, Family Day provides a day of programs for students and their families. Student organizations are encouraged to participate in the events.

Fresh Check Day®—Fresh Check Day is an uplifting mental health fair that includes peer-run interactive booths, free food, music, and exciting prizes and giveaways. Fresh Check Day is coordinated by Counseling Services.

Homecoming—Held in the fall semester, Alumni and family members are invited on to campus to enjoy many programs such as Homecoming Football Game, Family Fun Activities, and more. All student organizations are encouraged participate in the events.

Leadership Summit—The Leadership Summit, held in February, provides an immersive off-campus weekend program to students who wish to learn more about their own leadership styles and skills.

Leadership Symposium—The Leadership Symposium is an annual spring event that allows students to attend leadership-focused workshops held by staff, faculty, alum, and community members.

SGA Elections—The Student Government Association (SGA) holds elections each spring and fall. Encourage your students to participate in these elections.

Welcome Week—Events are planned during the first week of school to help welcome new students and welcome back returning students. Student organizations are encouraged to participate in the events.

Below you will find the programming timeline highlighted in Synergy. Remember that larger events need a longer timeline, especially those with many details or trips that include additional flights, transportation, and registration fees.

Your organization's Program Coordinator is a great resource for helping develop your programming timeline. Your students can also pick up a Programming Timeline Checklist companion handout in the Resource Room, which expands on the steps listed in the general timeline below.

4-6 WEEKS	6-10 WEEKS	10-12 WEEKS
Bake Sale	Comedian	Trip – Conference/Competition
Game Night	Fundraiser (items/shirts)	Trip - International
Movie Night	Lecture	Theme Weeks
Social	Music Event	
	Party	
	Show/Performance	
	Trip - Social	

The six steps below give your organization a starting point for putting together your own programming timeline.

Step 1: Brainstorming Stage—This includes selecting a date, time, and location for your event. One or two Student Coordinators who have completed EPT should be selected to lead the planning and implementation of the event. Your Student Coordinator's first focus is to develop an event budget and decide if they want to submit an additional allocation to Senate for extra funding or reach out to other student organizations and ask about co-sponsorship.

Step 2: Start Planning—Once they've decided on your event and gathered quotes, your Student Coordinator should make an appointment to meet with their Program Coordinator to submit an Event Clearance Form and review event details. This is also the stage where they would complete your Food Form, request any contracts needed, complete event tickets, arrange transportation, or order supplies as they relate to their event.

Step 3: Develop a Publicity Action Plan—The only way students will learn about your organization's event is through publicity. OSILD encourages students groups to get creative with their publicity – it can be so much more than just posters and flyers! They can order promotional novelties to hand out, include their event in the weekly email newsletters, and post it on OSILD and University social media. Just remember that they need to promote, promote, promote!

Step 4: Last Minute Details—All members should help with the event, including setup and breakdown. Volunteers will help the event run much more smoothly and provide the Student Coordinator with extra event assistance.

Step 5: Event Day—Students should be prepared to set up their event ahead of schedule, and use their volunteers as needed. Have them check any tech equipment, and they should have a copy of their Event Clearance Form and contract/rider on hand in case there are any questions. When the event has ended, the space should be cleaned up as needed, including picking up trash, vacuuming if a large mess was made, and taking down any decorations or signs you put up.

Step 6: Event Evaluation & Wrap Up—Evaluate the event at the weekly club meeting and take notes to reference back when planning the next event. What went well? What would you change for next time? Submit any receipts or invoices to the treasurer for payment.

What are the different types of funding?

Major Organizations receive a budget through the spring Budget Request Process. Each major org submits a budget in March to the Student Senate and receives a finalized budget for the next fiscal year in April. The budget consists of multiple line items.

Special Interest Groups receive a budget of $500 when they are re-recognized for the year. Chairpersons and Advisors receive a letter in August instructing them on the re-recognition process.

What is the Line 99 account and what is it used for?

Each student organization also has a fundraising account known as Line 99. It is very important to keep money in this account through fundraising or donations. This line carries over from year to year and can be used for things such as leadership conferences, end of the year parties, banquets, and appropriate gifts. There is a $50 limit per person on individual recognition awards for outgoing officer, seniors, advisors, etc. There is a $30 limit per person can be spent on clothing or personal items for general membership only. Please refer to the Synergy Handbook for additional rules on using the Line 99. Dollar limits are at the discretion of the OSILD Director.

How do the students pay a bill?

All bills must be processed through our office using a Finance Form available on **lead.worcester.edu**.. Original receipts, invoices, or bills must be used when processing the voucher. The Procurement Office does not reimburse for sales tax so it is important to use a sales tax exempt form located in our office before you purchase anything. Reimbursements must be done within 30 days of receipt. Please remember it can take up to 45 days to get a check cut - plan accordingly!

What is a Purchase Order?

Some companies require a purchase order from the university before they fulfill an order. It is a form and number that states we have the funds to pay the company. The Finance Form is available on **lead.worcester.edu**. Please remember… it can take 2-3 weeks to receive a purchase order number. A purchase order does not pay the bill. The group will receive an actual invoice when you receive the goods, so keep your eye on the mail and make sure to process a check request voucher when you get the bill. Advisors and Club Sport Coaches should never make a purchase without prior OSILD approval.

How can our organization get more money for programs?

There are many options for student organizations to find additional funds to use for programming.
- **Fundraising** – All student organizations are encouraged to do fundraisers throughout the year. All fundraised money will go into your Line 99 account and can be used for programs as well as the other uses listed in the above description. Before planning a fundraiser, please make an appointment with your Program Coordinator to discuss the details and fill out a Fundraiser Registration Form. There are many rules that go along with fundraising, especially raffles and it is important to review them before proceeding with the fundraiser.
  ***All fundraised money needs to be given to our office immediately upon receipt for deposit into your account. **NEVER** deposit money into your own personal account or leave it in your office, car or home. You and your organization are responsible for the money until it reaches our office. Money cannot be collected via Venmo, Paypal, CashApp, or any other online money transferring app.

- **Co-Sponsorship** – All student organizations are encouraged to co-sponsor events with one another to maximize resources and to build a sense of camaraderie within student organizations. Special interest groups should definitely take advantage of this as they only receive $500 for a budget per year. Administrative and Department Offices may also be interested in co-sponsoring with student organizations.
- **Additional Allocations from Student Senate** – The Student Senate will consider additional allocation requests from all student organizations. They are able to give out extra money in addition to the budget already given to the organization. There is an Additional Allocation Request form available in OSILD. Please be advised that it can take 2-6 weeks after submitting the request for funding to be made available if the Student Senate votes to approve the request so plan ahead accordingly. The deadline to submit is March 1st.
- **Line Transfers** – *Major Organizations Only* – Money can be transferred between line items or categories within the budget that you were originally given by the Student Senate. This way you can maximize the funds that were allotted to you without having to ask for additional funds. Line Transfer Request forms are available in OSILD; the deadline to submit is April 1.

Cash Boxes

Cash boxes are available in our office for use by student organizations. They can be used for raffles, fundraisers or selling tickets at an event. OSILD will provide the box with change. There is a Fundraising Form available online which can be used to reserve a cash box at least 48 hours before the event. Please remember, all cash boxes must be turned in immediately following the event or fundraiser.

Deposits

All checks, cash, donations, tickets sales, etc. that are collected by your student organization must be deposited in your account immediately upon receipt. OSILD handles all deposits as soon as we receive them by the student organization. All credits and debits will post to your account within 2-3 days. To receive an updated record of your available funds, please come to OSILD. All checks that you receive in fundraisers, dues, donations, etc. must be made out to "Worcester State University" not to the name of your student organization. Student organizations should not spend anticipated funds before they are available in their budget.

Organization bank accounts

A student organization may not have an individual bank account outside of Worcester State University. No online fundraising is allowed for student organizations through avenues including Venmo, PayPal, or crowdfunding websites.

Cash Payments for Services

This is not allowed. A student organization cannot pay a performer or raffle winner out of money collected at the event. The money must be deposited and a check will be cut for the raffle winner or performer.

How will the Treasurer and President of my organization know all of this information?

Student organizations are required to send their Treasurer to a Budgeting Workshop at the beginning of the academic year. Funds will not be released to a student organization until the treasurer has attended this workshop. Presidents/Chairpersons are also highly encouraged to attend. A list of the available workshop can be found on **lead.worcester.edu**.

Detailed budgeting procedures can be found in *Synergy*.

TRIP AND TRAVEL POLICIES

Before planning any type of trip, including attending conferences, it is very important for your students to meet with your Program Coordinator. A lot of additional planning needs to be done in order to plan a successful trip.

Here are some important things to consider when planning a trip:
- Before planning any part of a trip (booking a bus, ordering tickets, registering for a conference), a Trip Proposal form must be filled out and submitted to OSILD. The proposal must be approved by our office before any plans can be made. Please have the following information available when filling out the Trip Proposal form:
  - Purpose of the trip and proposed itinerary
  - Estimated number of participants
  - Trip location and date(s) of the trip
  - Cost of entire trip including transportation, tickets, registration fee, hotel costs, etc. You may need to call the different companies to get estimated costs for the trip.
  - Source of funding for the trip including, estimated cost for each attendee
  - Name of Advisor(s) attending the trip. All trips require an Advisor to be present. Two Advisors are required for bus trips; three Advisors are needed if there are two buses for the trip. The final number of Advisors required for a trip is at the discretion of the OSILD Director.
- During any trip, an Advisor is a representative of Worcester State University and should conduct themselves as such. Advisors should keep a copy of the Emergency Contact Form on them at all times in case of emergency. In the event of an emergency or other issue during a trip, the Advisor shall provide assistance. The organization's Program Coordinator should be made aware of any trip issues as soon as possible.
- Advisors receive one free ticket for the trip that they are advising, and have the option of purchasing a ticket for a guest at full ticket sale price.
- If a purchase order is required for any trip-related expense, please remember that it takes 2-3 weeks to produce a Purchase Order.
- If any Advisor will be getting reimbursed for any expenses during the trip or conference, the Advisor must fill out an employee travel form and submit it to their supervisor. When the Advisor returns from the trip, all receipts must be turned in with payment vouchers for reimbursement as well as completion of the blue Travel Expense Voucher form. If these forms are not completed, a reimbursement is not possible.
- Reimbursements for mileage are possible for students and/or Advisors who use their own car for transportation at the state mileage rate. Reimbursement for gas is not allowed. Meal reimbursements may also be available for conference attendance. Anticipated reimbursement amounts should be factored into the total travel costs during the initial budget planning.
- Liability waivers are required to be filled out by all attending the trip if traveling outside of Massachusetts. A copy of the waiver must be submitted to our office and/or University Police prior to departure.
- Advisors should be present for the trip check-in process. If a student is brining a guest on the trip, they cannot check-in until the guest is present, and they are required to show an ID.
- Tickets must be sold for all trips at the Information Desk. Tickets may not be sold at club meetings.
- Larger trips or conferences longer than a day may require financial contributions from the Advisor/Coach. Please make sure to discuss this with your organization during the trip planning state.
- Make sure to connect with your organization's Program Coordinator to have the Advisor(s) attending the trip complete the Off-Campus Clery Act and Title IX Guidance Reportable Travel form.

- In addition to guidelines outlined in *Synergy,* the club Advisors should also be aware of WSU alcohol policies and guidelines, alcohol protective factors, and expectations for student behavior. While advising trips, the Advisor should be familiar with the signs and symptoms of alcohol poisoning which include
  - Confusion, stupor
  - Person cannot be roused
  - Vomiting
  - Seizures
  - Slow breathing (fewer than 8 per minute)
  - Irregular breathing (10 sec. between breaths)
  - Hypothermia (low body temp.), bluish skin, pale
  - If the advisor expects a student is suffering from alcohol poisoning, the appropriate care should be taken to ensure the safety and well-being of the student.

Advisors for Conferences and Competitions
Advisors are required for most off-campus trips; the number of Advisors required is as follows:
- Trip within New England and New York, day only – No advisor needed
- Trip within New England, overnight – 1 Advisor for any number of students
- Trip outside New England but within the United States – 1 Advisor for up to 10 students, 2 Advisors for 11 or more students
- Trip outside of the United States – 2 Advisors for any number of students

The final number of Advisors for any conference or competition is at the discretion of the OSILD Director.

During any trip, an Advisor is a representative of Worcester State University and should conduct themselves as such. Advisors should keep a copy of the Emergency Contact Form on them at all times in case of emergency. In the event of an emergency or other issue during a trip, the Advisor shall provide assistance. The organization's Program Coordinator should be made aware of any trip issues as soon as possible.

Senate will fund the required number of Advisors for up to two events per year; each additional Advisor will be at the cost to the student organization or the Advisor themselves. Senate funding will cover the hotel/accommodation and conference registration. Food will not be covered by Senate, but can be funded through another office or department. Advisors will only be funded for a competition if the Worcester State University team/delegation is competing.

The full text of the Worcester State University Student Travel Policies can be found in *Synergy*.

HELPFUL HINTS & INFORMATION

- All student organizations have a mailbox in OSILD on the second floor of the Student Center. It should be checked regularly by members of the organization for important documents and memos from our office.
- All student organizations are eligible for an email account if they choose. Please have your organization reach out to their Program Coordinator to learn more.
- The Wall of Forms is where your students can find any student organization related form.
- The Information Desk on the first floor of the Student Center will sell tickets for all student organization events.
- A popcorn machine is available for student organizations to use for on campus events. A form is available in our office to reserve it. It does not come with the popcorn and oil but Chartwells will sell your organization popcorn kits.
- Food Service forms must be submitted to Chartwells at least 7 business days before the event. That means you must turn in your form to OSILD for approval before that time period. Advisors are not allowed to place an order for a student group on the online ordering system Catertrax.
- Movies cannot be shown by any student organization unless the rights are bought to show the movie. It is illegal! Please see our office for more details on the rights purchasing process.
- There are yellow portable display boards that are available for student organizations to reserve to help publicize their events. A Display Board Reservation Form can be found at **lead.worcester.edu**.
- Student organization officers must have at least a 2.0 GPA to hold their position in the organization and not be on disciplinary probation.
- Don't forget to remind students to utilize social media for recruiting members and promoting events.

CONTACT INFORMATION

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✉ studentinvolvement@worcester.edu

🐦 WSU_OSILD
📷 WSU_OSILD
📘 WSU.OSILD
▶ WSU OSILD

Part of the role of a student organization Advisor is to provide help and resources to students who may be having challenges during their college experience. Worcester State provides a variety of resources to Advisors who may need help supporting a student through a difficult time.

Working with Counseling Services

The below script can be used when discussing Counseling Services with the members of your student organization:

The Worcester State University Counseling Center is here to provide confidential, therapeutic support to students with mental health concerns and/or facing pressures unique to college students. Services are also provided to students that are in crisis. As your student organization advisor, I am available if you would like my guidance in seeking services. I may also consult with a Counseling Center staff member and/or make a referral on your behalf. You can contact the center directly via email counseling_WSU@worcester.edu or via telephone at (508)929-8072.

There may also be times when you wish to follow up with your student via email and refer them to Counseling Services. The below referral email template can be used in this situation.

Dear(Student)
I am writing as a follow up to our conversation. Thank you for being open with me about your mental health. Although I am not a confidential resource I would like to encourage you to follow up with WSU Counseling Services as it may be a helpful, confidential resource to support your well being and academic goals. You can email the counseling center directly at counseling_wsu@worcester.edu. I am also cc'ing them on this email and a member of their staff may reach out to you directly.
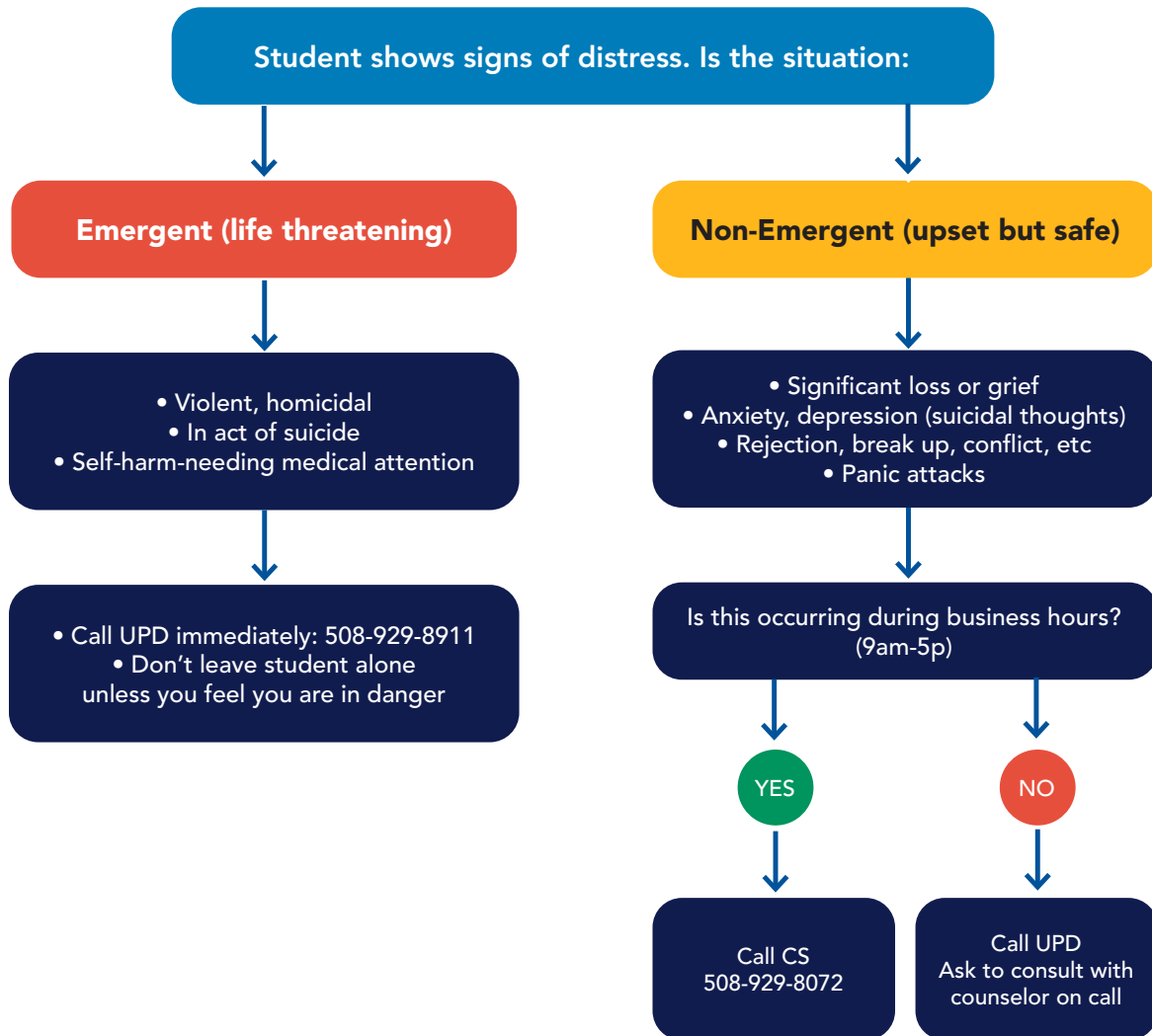
Mental Health Concerns

Any time an Advisor is concerned about a student's mental health, or if they are informed by a member of their organization about concern for another member, there are campus resources that can be utilized. The Student Intervention Team (SIT) accepts reports from the campus community regarding students who may be in distress, whether it be academic, social, emotional, or other. A full description of SIT and its methodology can be found at worcester.edu/Behavioral-Intervention-Team.

Any concerns for a student should be submitted through an ACT (Assessment Care Team) Report, which can be accessed through the FacStaff Toolkit located in the MyWSU Faculty/Staff Portal. Completing an ACT Report will initiate the ACT process, which includes reviewing the report, identifying the level of concern, and determining the next steps.

University Police should be contacted at 508.929.8911 if the individual requires medical attention or if there is an immediate threat of danger or injury to the individual or someone else. Please let team members know that they should contact University Police if they encounter someone in immediate danger.

The WSU Counseling Office is available to all students. Their office is located on the 3rd floor of the Student Center, and they can be reached at 508.929.8072 or counseling_wsu@worcester.edu.

FACULTY AND STAFF MENTAL HEALTH RESPONSE DECISION TREE

Student shows signs of distress. Is the situation:

Emergent (life threatening)
- Violent, homicidal
- In act of suicide
- Self-harm-needing medical attention

- Call UPD immediately: 508-929-8911
- Don't leave student alone unless you feel you are in danger

Non-Emergent (upset but safe)
- Significant loss or grief
- Anxiety, depression (suicidal thoughts)
- Rejection, break up, conflict, etc
- Panic attacks

Is this occurring during business hours? (9am-5p)

YES → Call CS 508-929-8072

NO → Call UPD Ask to consult with counselor on call

Title IX

As an employee of WSU, Advisors are considered responsible employees and mandatory reporters of any Title IX incidents that may be reported by any student. Title IX violations include sexual violence, sexual harassment, gender-based harassment, domestic violence, dating violence, and stalking.

In the event a Title IX incident is reported, the Advisor should make the student aware that they are mandated to report the matter to the Title IX Coordinator. The Title IX Coordinator, Jen Quinn, can be reached at 508.929.8784 or jquinn@worcester.edu.

University Police should be contacted if the individual requires medical attention or there is an immediate threat of danger or injury to the individual or someone else.

Student Conduct Issues

If an Advisor has a concern related to conduct with any of their members or think that there has been a violation of campus conduct policies, the club's Program Coordinator should be notified to discussion next steps and options for working with the student. The full text of the Student Code of Conduct and the Student Handbook can be found at worcester.edu/student-conduct.

WORCESTER STATE UNIVERSITY TITLE IX

Worcester State University is committed to creating and maintaining an academic and work environment that is free from sex discrimination (including discrimination on the basis of sex, sexual orientation, gender identity, and gender expression) and sexual misconduct (including sexual harassment, sexual assault, domestic violence, dating violence, and stalking).

Adherence to this commitment is ensured by University policies against discrimination and compliance with The U.S. Department of Education's Office for Civil Rights (OCR) Title IX of the Education Amendments of 1972. Title IX protects people from discrimination based on sex in education programs or activities that receive Federal financial assistance.

Title IX states:
No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance.

Title IX Scope:
Title IX prohibits sex discrimination in all university programs and activities, including, but not limited to, admissions, recruiting, financial aid, academic programs, student services, counseling and guidance, discipline, treatment of pregnant and parenting students, class assignment, grading, recreation, athletics, housing, and employment.

The Title IX Coordinator is charged with managing the University's response to reports of sex discrimination, which includes reports of sexual assault, sexual harassment, gender-based harassment, dating violence, domestic violence, stalking, and retaliation. Guided by University and federal procedures, the Title IX Coordinator aims to ensure that the University's response promptly, effectively, and equitably addresses the incident, prevents its recurrence, and remedies the effects of all forms of such prohibited conduct. In some instances, Title IX issues may impact a student's academic performance. Eligible recipients of academic accommodations will be determined and coordinated by the Title IX Coordinator.

Inquiries regarding Title IX may be referred to the Title IX Coordinator, Jennifer Quinn, Dir. Of Title IX at Jquinn@worcester.edu, wsu_titleix@worcester.edu, 508-929-8243, or in person in the Student Center, room 338. A report may also be filed at this link: https://cm.maxient.com/reportingform.php?WorcesterStateUniv&layout_id=7

Reports may be submitted at any time, even during non-business hours but please note the Title IX Coordinator does not monitor email on a 24 hour basis and may not review on weekends and evenings. Therefore contact may not be available during non-business hours except by referral from University Police. If you are not safe please contact University Police immediately at 508-929-8911.

STUDENT GROUPS AND ADVISORS: A HISTORICAL PERSPECTIVE

In the early years of higher education, extra-class activities not only were neglected, they were strongly discouraged. Early institutions emphasized the moral development of students, and it was the view of the university authorities that co-curricular activities corrupted the moral of students, even those activities considered culturally beneficial by later generations. The first student organizations in American colleges were literary and debate societies, patterned after similar organizations in English Universities. Bringing a degree of reason to campus life, where discipline designed to mold character of students was predominate, the literary societies promoted intellectual activity of a kind not given attention by the university.

Beginning in the 1820's and continuing to gather momentum in succeeding decades, contrary to the wishes of most university authorities, the rise of another organization-the fraternity-was evident on the university scene. Fraternities were designed to meet needs attendant to the emotional and social side of life, bringing together young men in small groups to help them deal with their separation from their home community and family and to provide a measure of escape from the monotony and unpleasantness of their academic lives.

Some university presidents wished to ban fraternities, while others put severe restrictions on them. Thus began the involvement by administration and faculty in the internal operation of student organizations-by design, a controlled function.

Women's fraternities or sororities were established in coeducational colleges of the West and South during the period following the 1870's. They were very much like the men's fraternities. These organizations also have been a significant force on the campus since their inception. Two other major types of organizations, religious groups and class organizations, which were later supplanted by university-wide student councils, existed prior to the turn of the twentieth century. And, athletic organizations and teams, beginning with Germanic gymnastics; however, it was not long before the universities themselves assumed responsibility for athletics. Throughout this period, there was little positive involvement by faculty in student activities except in the coaching of athletic teams.

The first serious academic interest was shown in student organizations by a doctoral student at Clark University, whose dissertation was completed in 1901 and published under the title of The History and Pedagogy of American Student Societies. Henry Davis Sheldon's hope was that others would become interested in the subject because he correctly grasped the significance of student organizations to the development of higher education in this country. Those who are seriously involved in understanding the historical role and functions of student organizations are indebted to Sheldon for his research and writing.

During the 1920's, there was a period of almost frenzied development of student activities, as programs were greatly expanded and diversified. The period culminated in the collegiate ideal of football, fraternities, and fun dominating the campus scene (Rudolph, 1962). The proliferation of activities led to the need for centralized and more approaches to student activities. Also required was an examination of the appropriated form and substance of student co-curricular life, in order for the maximum educational potential to be realized by students participating in campus activities.

STUDENT ACTIVITIES PROFESSIONALS AND PHILOSOPHY

During the 1930's, in addition to the organizations and activities in which earlier student generations had participated, national student organizations and peace clubs were formed, as students became involved more heavily in social-political issues and activities. With the growth and diversification in campus activities, a trend toward centralization to provide leadership and direction for the activities program was established. In the early 1940's, the Student Activities Bureau was established at the University of Minnesota, based upon a study which had been carried out to assess needs for the student activities program at the institution in 1933 (Brown, 1937). From that point onward, the development of activities offices and programs was rapid and widespread.

The function of student group advising had come of age by the end of WWII, involving professional staff with specific responsibility for working with the organizations as well as faculty members who advised specific groups.

By the 1940's, a comprehensive philosophy of student activities had been developed by Ruth Strang, ascribing to activities developmental values, diagnostic values, therapeutic values, and values to school and community (Strang, 1946). The emphasis placed by these educators on student development moved the advisor's role into the educational realm, since the values which they delineated are inextricably a part of the mission of institutions of higher education. The faculty/advisor's role, according to this evolving philosophy, became one of helping students to get optimum educational value from their activities.

As a guide to those in education who advise student groups, the American University Personnel Association published a monograph dealing with the role and functions of the advisor (Bloland, 1967). In this publication, the author identified three major areas of advisor function: (1) maintenance or custodial functions, (2) group growth functions, and (3) program content functions. His thesis was that the accomplished advisor would be performing all of these types of functions when they were appropriate in specific situations and in no particular sequence. Stating the belief that good advising is very similar to good teaching, the author concluded that the student organization advisor must provide active, continuing academic leadership to the group, rather than assuming a passive role.

In the following decade another study was conducted by the task force of the American University Personnel Association Commission IV to identify current issues in student activities. The central finding of the study was that the major issues lay on the areas of financing activities, identifying student interests and needs, and establishing relationships between activities and academic programs (Task Force on Central Issues in Student Activities, 1973). Certainly, advisors of student groups can be helpful in dealing with these issues; and faculty who work closely with student groups should be in an excellent position to help with relating student activities to academic programs.