Student Organization Handbook

2013-14

University of Mary Washington

Welcome

Welcome to the Office of Student Activities and Engagement! The Student Clubs and Organization Handbook was created to help our students:

- Start a club
- Plan events
- Budget the funds allocated for events
- Promote events to the campus community
- Learn what is available to them
- Work together on hosting events, thereby building community.
- Work toward becoming better leaders.

SAE Mission Statement:

Our mission in SAE is to work collaboratively with students, faculty and staff to promote programs and opportunities for students to not only have fun on campus, but to develop interpersonal, organizational, leadership and citizenship skills. We encourage students to explore their own skills, interests and values and to learn to respect the values and beliefs of others. We hope our students will become proponents of positive social change in their present and future communities.

The office engages students and encourages these skills and personal growth in the following ways:
- Provides support to student organizations from group advising to workshops and retreats.
- Provides a social and recreational outlet by creating and sustaining programming spaces and supporting the activities held there.
- Challenges students to explore new perspectives and experiences.

The Staff

All members of our staff may be reached by calling 540 654-1061 or e-mailing SAE@umw.edu.

Director of Student Activities and Engagement
Joe Mollo   jmollo@umw.edu

Assistant Director of Student Activities and Engagement
Megan Higginbotham   mhiggin3@umw.edu

Office Manager/Financial Technician
Rebecca Bezdan   rbezdan@umw.edu

Program Coordinator
Megan Petter   mpetter@umw.edu

Program Support Technician
Sally Gaby   sgaby@umw.edu

Graduate Assistant
Liz Bradley   lbradley@umw.edu

The staff in SAE are here to help your organization with:

- The daily questions that arise when leading a group
- Ice breakers
- Planning and scheduling activities
- Formulating a budget
- Leadership development
- Contracting entertainment
- Obtaining an account with the University
- Completing the forms required to conduct business
- Van certification and reservations
- Room reservations
- And much, much more!

Recognized and Non-Recognized Student Organizations

While this Handbook is designed to answer questions for any student, many of the policies and privileges outlined pertain only to officially recognized student organizations. A recognized student organization is one that complies with the University's Statement of Inclusion and has been officially recognized by the Board of Visitors (BOV), Student Government Association (SGA), Inter-Club Association (ICA), or a University office such as SAE.

Non-recognized groups are those that have not received an approval from ICA, SAE or other University departments to be a recognized student organization. They may reserve space on campus, though they will receive lowest priority in making reservations and these reservations may be cancelled at any time. They are not eligible to utilize those resources designated for recognized student organizations (i.e., apply for funds from the Finance Committee or utilize the equipment and supplies purchased by SAE and ICA for recognized clubs). To be eligible to reserve space, non-recognized student groups are required to submit an Annual Club Registration Form to the Office of Student Activities and Engagement (SAE) in order to maintain their recognized status, and so they can be kept informed of University events, changes in policies and procedures, and available resources.

Recognized student organizations can find the Club Registration Form on OrgSync. Non-recognized student groups can come to the SAE office and obtain a hard copy.

Statement of Inclusion

it is understood that organizations were formed to bring students with similar interests together.   At the University of Mary Washington, student organizations serve that function. They add to the vibrancy of UMW, and are a part of what makes this an inclusive community. The leadership of all organizations is encouraged to find ways to include all students into their groups and to provide an environment that celebrates and respects both the similarities and differences of the membership.   In order for a student organization to receive recognition, membership shall be open to all currently enrolled University of Mary Washington students unless an exception to that policy is provided by state law. Section 23-9.2:12(1) of the Code of Virginia provides that "A religious or political student organization may determine that ordering the organization's internal affairs, selecting the organization's leaders and members, defining the organization's doctrines and resolving the organization's disputes are in furtherance of the organization's religious or political mission and that only persons committed to that mission should conduct such activities." A recognized student organization shall not be discriminated against for exercising its rights pursuant to §23-9.2:12(1).

Important Dates
August

26: (First Day of Classes) Meet the Leaders BBQ – this event offers a great opportunity for your club to meet informally with members of the incoming class and with other student leaders to discuss ways to collaborate.

28: Club Carnival – open to all registered clubs. Advance registration is required.

September
TBA: Financial Training – this is mandatory for all club Treasurers and at least one other signatory for your organization must attend one of the sessions offered.

7: Event Planning Workshop – learn the ins and outs of hosting an event here at UMW.

30: Deadline for all clubs to be registered with SAE. Groups that are not registered by this date will be placed on the inactive list. Funds allocated by the Finance Committee to a club placed on the inactive list will be returned to the Finance Committee. Clubs will be responsible for re-applying for these funds once they are granted active status by ICA. Reservations for space will be cancelled.

Starting an Organization

Many new clubs join our campus community each year. If you have an idea for a new organization, consider seeking recognition by the Inter-Club Association (ICA) and registering with SAE. This will allow your new organization, if approved, to request funding from the Finance Committee for the money to cover expenses related to club events, publicity, and travel. The following information will help you start a new club or organization. For more information, go to SAE where someone will answer questions you may have.

What Groups Can Become Recognized Student Organizations?

- ICA may recognize as an official student organization any group whose purpose is distinctive from already existing clubs and organizations.

  In order to be recognized by ICA, groups must be "distinctive." Distinctive is defined as being different than any group that is already in place. As part of the approval process, the Executive Board of ICA will determine whether or not the proposed group should be a new organization or a committee of an existing one. The main reason is simple – having two organizations with similar missions usually results in both competing for the same resources, with one of group being successful and the other not.

- Groups may also seek recognition through SAE. However, any organization recognized by a department of the University must provide its own funding.

- The Board of Visitors (BOV) and individual University offices may also recognize student groups. These recognized groups are not eligible for financial support from the Finance Committee and must provide their own funding.

What is the Inter Club Association (ICA)?

ICA is a Presidential Committee of the Student Government Association. Its sole purpose is to meet the needs of and to better train UMW student organizations to become more efficient, more fun, and more beneficial. The President of each ICA recognized student organization, or his/her representative, is a voting member of the ICA.

To apply for membership with the ICA, your student organization must:

1. Hold a preliminary interest meeting to develop a list of at least 10 other interested students. Use this meeting to develop a concise mission statement that briefly outlines the goals and objectives of your organization.

2. Present a preliminary constitution, a list of 10 prospective members, and the name of a faculty/staff sponsor to the ICA President, and to the Director of the Office of Student Activities and Engagement. A sample constitution is available in this handbook and in the ICA Office in the Student Activities Suite in Seacobeck Hall. Members of ICA are also available to help develop constitutions.

3. Abide by these terms:
   a. Be open to all full-time undergraduate students unless an exception is provided under state law.
   b. Subscribe to the Statement of Inclusion.
   c. Subscribe to all University policies and procedures.

The Executive Board of the ICA will review your application as well as the SGA Cabinet. Upon completion of the process, you will be notified of your organization's standing.

OrgSync

OrgSync is UMW's network to get involved! It is an online software platform that streamlines student organization management. Each recognized student organization receives a portal with over 50 tools to operate the group's communication (text messaging, polling, news, etc.), event and budget planning, public website and much more!

From writing content ONCE in OrgSync, you will be able to:
- Decide who can see it
- Email it
- Share it to Facebook
- Share it to Twitter

- Generate a QR code for publicity (UMW can access it from their phones!)
- AND **Archive** it (so that next year's officers will know what to do!)

It saves you time and energy and creates for a seamless transition between officers with just a couple of clicks from your mouse!

The public website for your organization has never been easier to manage. Any content you post in OrgSync as public, will automatically update your website. UMW has created a custom template just for our organizations and it's FREE for registered student organizations!

Need to collect any forms from your membership? Collect it online with OrgSync forms that can be filled out from smart phones, event during your meetings. OrgSync will create a spreadsheet of that information for you so you don't waste hours of your life typing it up!

How are you keeping track of attendance at your meetings and events? Are you? By using the "timesheet" function in OrgSync, you can keep track of your membership's volunteer hours and tell you quickly who's attended what meetings and when. Using this function in OrgSync will also help you see what all you have done during your time at UMW!

Any questions regarding OrgSync can be addressed by emailing sae@umw.edu, or by meeting with the SAE staff.

Registering with SAE

All groups are required to register with SAE. Once a club is recognized by ICA or SAE, it must register using OrgSync. If a group or organization would like to receive funding from the Finance Committee, then they must be recognized by both ICA and SAE.

To register your student organization, simply complete a "Student Organization Registration" form on OrgSync and send it to sae@umw.edu Those groups and organizations that are both recognized and registered may enjoy the following privileges*:

1. Access to the amenities of SAE:
   a. Fax Machine
   b. Discounted office supplies
   c. Sound and lighting equipment
   d. Promotional materials such as banner paper, Texas markers, and a thermal poster machine.
   e. Equipment Use, such as pop-up tents, ice chests and water coolers
2. The option of reserving on-campus meeting space.
3. Have an Organization Network Account where your organization is given a UMW email account and space for a web page that will be linked to the SAE site.

Please refer to the "Benefits of Recognition" Section of this handbook for more information on these privileges and resources.

Creating a Constitution

Every recognized organization must have a constitution approved by SAE and, if seeking funding, also by ICA. The constitution should adequately represent your organization in every aspect, from your group's goals to leadership office descriptions. Your organization's constitution needs to be made using a standard constitutional format. Here are some tips on how to formulate your organization's constitution:

Important Articles:
- Name of Organization
- Organization's Purpose: Describe why your organization should be recognized by the school and what benefits it will create for student life.
- Officers: How will your group organize its leadership structure? What will each officer's job be? How will the group elect/appoint leaders?
- Finances: Who will be responsible for your budget? Will it come from Finance Committee funds, member dues, or fundraising?
- Meetings: When will meetings take place? Will there be a separate officer meeting? How will they be run?

A sample constitution is available on the SAE Website. Remember, this is meant to be an example to help you write the constitution for your proposed organization. Don't just copy the document and change the name of the group. The constitution you propose should meet the needs of your new group.

* A sample constitution can be found here:
http://www.umw.edu/documents/document/student-organization-sample-constitution/

* Many organizations run their meetings using Parliamentary Procedure. For more information on these procedures, we recommend checking out Robert's Rules of Order at www.robertsrules.com.

Faculty/Staff Advisors

Every organization needs a faculty or staff member to act as an advisor. While the role of a faculty/staff advisor can vary depending on the needs of the club and its members, advisors are a great resource for your club. Please read the following and refer to the "Faculty/Staff Advisor" section of this handbook before you fill out the Student Organization/Faculty Advisor Relationship Agreement.

The Role of an Advisor
As a student organization with competent and capable leadership, you might wonder why you would need a faculty or staff advisor, but consider the following:

- Do you sometimes wish your group had more support from related academic or service departments?
- Could your organization benefit from connections with University policymakers?
- Though you are doing a great job now, will your group have to start again from scratch next year?

A faculty or staff advisor could help alleviate these and other problems without taking over the leadership of your organization. Advisors play an important role in the development of the student organization by providing support and guidance.

The role of the faculty/staff advisor is to:
- Serve as a sounding board for new ideas.
- Support your group.
- Intervene in conflicts between group members and/or officers.
- Be knowledgeable of policies that may affect your organization's decisions, programs, etc.
- Provide continuity and stability as student leadership changes.
- Provide your group with connections on campus.
- Serve as a mediator during an organizational crisis.
- Give honest feedback to group members, especially the officers as they meet the needs of their peers.
- Point out new perspectives and directions to the group and introduce new program ideas.

The organization-advisor relationship benefits the advisor, too. Being involved with a student organization offers the faculty or staff member unique opportunities to:
- Get to know and work with students outside the classroom or office.
- Informally share knowledge and expertise on topics relevant to the organization.
- Feel satisfaction and accomplishment by making a special contribution to a particular group of students.
- Inform the transfer of knowledge and skills learned from the co-curricular experience.
- Serve as a resource and support person as well as facilitator of creativity and innovation for the group.

Choosing an Advisor
Your organization should do several things when it is searching for an advisor. First, develop a clear statement of group goals and a clear statement of the expectations the group has for the advisor, both in terms of role and time commitment. It is also helpful to outline what the advisor should expect of the group. With this information, you may approach potential advisors and discuss with them their interest in and ability to advise your group. The most suitable advisor is one who shares a common interest with your organization.

Things to remember:

- Poll your group members for the name of professors or staff members they have found helpful and interested in student life.
- Approach potential advisors confidently and positively.
- Remember to be clear about the purpose and activities of your organization, your expectations of the advisor, and all benefits the advisor will enjoy.

Once your advisor has been selected, keep him/her well-informed, clarify expectations and roles when needed, and draw on his/her expertise. Occasionally, acknowledgement of the advisor's dedication to the group is a good idea. If you have T-shirts made for the organization, for example, make sure your advisor has one too! Enjoy what can be an extremely rewarding and mutually beneficial relationship.

Transition

A great club transition notebook and communication with past members of the organization can help ensure a successful future for your club! In order to keep your club running in future years, it is important to keep a good record of everything that your club does and how it accomplishes its goals. An effective way to do this is by compiling a transition notebook in which you keep copies of the constitution, membership and officer lists, forms, and publicity from events. Officers may pass this notebook on from leader to leader, or the club advisor may keep it. Let the new leaders of the club know that they may contact you with any questions they may have.

See the *Resources for Leaders* section for more information on Transition.

Benefits of Club Recognition

To help your organization develop, grow, and thrive within the UMW community, let's talk about opportunities and support the school can offer your organization. There are a number of important resources available to each student organization, in addition to financial resources and help with planning events. By reading carefully through the resources section you may ensure your organization is taking full advantage of everything that UMW and SAE have to offer.

To be eligible for these benefits, your organization MUST complete the Club Registration Form for the current academic year. Once you complete this form and submit it to SAE, your club will be eligible to:

- Reserve space
- Host events
- Use the Student Organization credit card if your group has an account with the University
- Spend the funds allocated by the Finance Committee (ICA Clubs Only)
- Utilize any other funds in your account

Clubs that do not register for a full academic year and fail to register by Sept. 30 of the subsequent year will be considered inactive and will have to re-apply for recognition.

SAE Suite Resources

The SAE suite offers a number of resources and privileges to recognized and registered campus organizations including:

- Use of Student organization offices.
- Use of the SAE fax machine.
- Use of the SAE Conference Room.
- Help ordering office supplies and furniture for discount prices.
- The opportunity to become involved in SAE-sponsored programs.
- The ability to be nominated for a UMW Leadership Award.
- Credit cards for recognized student organizations to use.
- Assistance with planning events
- Assistance with the development of a budget to present to the Finance Committee
- Assistance with gaining access to use University vehicles
- Room reservations.
- Equipment for organizations to borrow, such as drink coolers, ice chests, tents, and outdoor games.
- Use of a computer station with Adobe Design CS4 to create fliers.
- Use of thermal poster machine, banner paper, and Texas markers.
- And much, much more!

The Student Organization Offices

Any recognized student organization is welcome to use the Student Organization Office, which is located in the SAE Office suite, the third office on the right. The office is left open Monday thru Friday from 8 a.m. to 5 p.m. The office is for organization use only and has many features, including:

1. A computer which is networked into the main SAE office printer.

2. Art supplies, including markers, pens, paper, poster board, scissors, etc. for flyer and/or poster construction, and paint for the Spirit Rock (for ICA recognized clubs).

3. Space for small meetings, either in the student office or the SAE Conference Room.

Contact:
SAE
(540) 654-1061

Housekeeping in Campus Organization Offices
Student organizations that have dedicated office space in the SAE suite are required to keep their spaces clean. Dirty dishes need to be returned to Dining Services before closing the office for the day. University housekeeping staff will periodically empty trash, and mop floors if a space is clear and clean, but will not move piles of accumulated items. Large piles of trash need to be taken to the dumpster. Also, students using the common areas of SAE, such as the kitchen or conference room, are required to clean up after themselves. Failure to do so will result in a loss of the assigned office space.

Phone Use in Student Organization Offices
All Student Offices located within the SAE suite have the option to obtain a telephone number, voice mail, and the ability to make long distance calls. These calls should be limited to professional activity and use only. The group must apply for funding from the Finance Committee to cover this expense since the calls will be charged once a month to the organization's account. If your office frequently makes long distance calls, you might want to ask officers to keep a log of these calls, so that you are better able to keep track of where the calls are going and who is making them. A sample log is located below:

Date	Caller	Person Called	Phone Number	Purpose	Length of Call
10/06	Betty	Bob Smith	123-4567	Conference inquiry	7 min.

Student organizations without an office in the suite may use the phone provided in the Student Organization Office and will also be asked to complete the phone log located next to the phone.

Fax Use
Student organizations have access to a fax machine in SAE. Faxes should be related to your organization. The fax machine is located in front of the Finance Office (second door on the right as you go down the hall). If you have never used a fax machine before, instructions are posted on the wall or please ask the SAE staff for assistance.

Fax Machine Guidelines:

1. If there is a fax waiting to be picked up, please give it to SAE front desk staff.

2. Complete the sign-in sheet by the fax machine. Be sure to include the following information:

   a. Date
   b. Name of your organization
   c. Your name
   d. Number dialed
   e. Number of pages you are faxing

3. Place your fax face-down into the feeder.

4. Dial the phone number that you are sending the fax to. Dial 9 before an off-campus number. To send a fax to a campus machine, just dial the last four digits of the phone number.

5. Remain by the fax machine to be sure that your fax is sent. Do not leave your fax in the machine.

    a. The fax room is locked in the evening. Please allow plenty of time to send your fax during business hours.

Student Leadership Awards

In the spring of each year, the Center for Honor, Leadership and Service sponsors the presentation of Leadership Awards to recognize those student leaders and student organizations that have done an exceptional job during the year. SAE encourages applicants from groups of all varieties to apply for the award. This is a wonderful way to show your appreciation each year!

Both individual and organization recipients will receive a certificate to keep. In addition, recipients of specific awards will have their names added to a plaque containing the names of all past recipients. These plaques, with the names of both individual and organization recipients, can be found in SAE.

To nominate a person or group you feel deserves this exceptional recognition, look for the nomination forms – available to all students, faculty, and staff – in early spring. A committee of students, faculty and/or staff will select the recipients, who will be announced at the annual spring reception.

Contact:
Director of Leadership
Golda Eldridge
540-654-1665

Use of Campus Vehicles

Many student organizations attend conferences or plan off-campus trips that require special travel plans. To help student organizations plan the best travel arrangements, UMW provides passenger vans. There is a charge for using these vans. Therefore, clubs must have sufficient funds in their account to cover the cost of travel and the drivers must be certified UMW students, faculty or staff. Please read through the following guidelines and requirements to take advantage of any of these resources.

Becoming a Certified UMW Vehicle Driver
UMW vans and vehicles are a resource for student groups and organizations to use when going to an event. A student wishing to become certified to drive UMW vehicles must take the Van Familiarization Training class. This class is required for all UMW students wishing

to drive State-owned vehicles for University recognized events. The course takes approximately 2 hours. Student drivers must be 18 and possess a valid Virginia driver's license to take the course. All drivers are insured by the University insurance policy.

Topics covered include:
• Procedures for reporting accidents
• Procedures for refueling
• Procedures for effecting mechanical repairs
• A brief overview of safe driving practices and hands-on "behind the wheel" driving and backing experience.

All students must present a valid Virginia driver's license at time of registration. Classes are scheduled by the Parking Management office. Students looking to attend one of these training classes must complete the application form which is located on the Parking Management website in order to be scheduled for the a class.

Go to: http://adminfinance.umw.edu/parking/student-driver-training/

Contact:
Parking Management
(540) 654-1129

Using the UMW Vehicles

Certified drivers may use UMW cars and vans to transport members of their organization. Because these are state vehicles that your organization is borrowing, please follow these guidelines when requesting a vehicle:

1. The trip should be related to the purpose of your organization or serve to represent UMW in an official capacity.

2. Only University-related personnel or students may be transported in UMW vehicles.

3. Complete and sign a Vehicle Request Form. Be sure to have it signed by the Director of Student Activities. The form must be submitted to Facilities Services at least 5 days prior to the trip – but the earlier the better, since vehicles are available on a first-come, first-served basis. You may use the SAE fax machine to fax the request to Facilities Services, and this is the preferred method of submission. You may call Transportation Scheduling at x2078 to check vehicle availability, but a vehicle will not be reserved until the Vehicle Request Form is complete.

4. Transportation Scheduling will fax back the approved/rejected form to SAE once they have received your form. You may contact SAE at least 24 hours after submission, or ask that a staff member contact someone from your organization

when a return fax is received. Do not consider your reservation confirmed until you have heard from them.

5. UMW vehicles are located at the Physical Plant building on Hanover Street (behind the Rugby Field). You will be responsible for picking them up and returning them.

6. If you are requesting to pick up a vehicle during business hours, the driver of the vehicle (with a VALID UMW University ID) must go to the Facilities Services work order desk (immediately inside the Physical Plant) and receive your vehicle packet which contains keys, a form to fill in mileage, insurance information, etc.

7. If you are requesting a vehicle over the weekend, a driver must pick up the keys and packet during business hours the FRIDAY BEFORE the office closes for the weekend..

8. Before driving your vehicle it is important to fill in the starting mileage in the form included in the vehicle packet.

9. **Vans are to be returned immediately upon the conclusion of your trip since someone else may be waiting to use the vehicle**. You are also required to fill in the ending mileage when you return your vehicle to Facilities Services.

10. If you return your vehicle during business hours, make sure all personal belongings are removed from the vehicle and return the packet to the Facilities Services desk inside the Physical Plant. If you return your vehicle after business hours, also clear the vehicle of personal belongings, seal the vehicle packet and place it in a drop box located outside of the main doors to the Physical Plant. Be sure to lock the vehicle if you return it after business hours.

11. A representative of the University administration or faculty may be required to accompany your group on each trip. If you are taking more than one vehicle, you do not need an additional staff member with you. In this case, the vehicles are expected to travel together in a caravan. Under no circumstances is one vehicle to depart leaving other vehicles behind.

12. Any absence from class is subject to authorization by the appropriate faculty member.

13. Students are allowed to drive unaccompanied by a faculty or staff member in certain areas of the state. These include: Prince William, Culpeper, Orange, Fredericksburg, Spotsylvania, Louisa, Hanover, Goochland, Stafford, Caroline, King George, Albemarle, and Charlottesville. On a case-by-case basis, Facilities Services may allow students to drive without accompaniment to the Springfield Metro Station. Transportation Scheduling has maps available for a complete list of the boundaries.

14. A faculty or staff member must accompany students when traveling beyond any of the above areas (e.g. to Richmond, Washington, New York, Baltimore, Williamsburg, Norfolk).

15. All vehicles that are over 15 years old or over 100,000 miles be restricted to round trips of 300 miles or less. It is recognized that this will result in a reduction of university owned resources available for longer trips. However, the state vehicle rental contract with Enterprise is an alternative source for vehicles. Vehicles provided from Enterprise have some driver restrictions.

Contact:
Facilities Services Transportation Scheduling
540- 654-2078
540- 654-1069 Fax

Student Organization Travel Policies

Student groups looking to travel must adhere to the SAE Student Organization Travel Policy as well as the University and Commonwealth of Virginia regulations.

SAE Student Organization Travel Policy
UMW provides opportunities for student travel to activities that facilitate and/or enhance the learning process taking place within the University community. Participation in such activities covered under this policy shall be limited to members of the University community.

Purpose
> The University of Mary Washington seeks to promote safe travel to events and activities occurring off campus by students of recognized student organizations. As such, this policy applies to individual student and recognized student organization travel where the travel within the borders of the United States and is sponsored by, or related to, official business for a student club or organization, regardless of the source of funding. Examples of activities and events that fall under this policy include, but are not limited to: field trips, outdoor recreation trips, trips to off-campus theme parks, and situations where a student or recognized student organization officially represents the University, e.g., leadership academies, conferences, and other programs.

Definitions
> For the purposes of this policy, a *recognized student organization* is one that has been formed for educational, professional, social, recreational or other lawful purposes, and has been approved for recognition by the Inter Club Association, Office of Student Activities and Engagement, or other University departments, and has a current registration form on file with the Office of Student Activities and Engagement (SAE).

A *currently enrolled student* is one who is a student who is currently registered at the University, whether on a full- or part-time basis.

An appropriate administrator is a Dean, Department Chair, or Director of an academic or administrative unit, or his or her authorized designee that has the authority to sign travel related forms.

General Requirements

All student and recognized student organization travel falling within this policy must meet the following requirements:

The travel must be consistent with the organization's mission statement and constitution on file with SAE or other campus department. Travel must be planned so as not to create an undue interference with academic responsibilities.

An individual student or recognized student organization must complete and submit a Request for Travel form to SAE before making any reservations or purchasing any tickets of any kind.   This form needs to be signed by two students who are traveling with the group, and by the Director of Student Activities and Engagement for student organizations, the Director of Campus Recreation for sports clubs traveling to compete, or the appropriate Dean or Department Head for academic clubs that have been authorized to sign travel forms.

All students traveling must complete and submit a Student Travel Contact Form and Conference Waiver to SAE or Campus Recreation no later than five (5) business days before the scheduled trip. The emergency contact information on this form will be shared with the Office for the Dean of Student Life.

All University sponsored overnight travel must be chaperoned by a member of the UMW full time faculty or staff.

The name, address, and telephone number of the faculty/staff member traveling with the group must be submitted to the SAE/Campus Recreation office. This person should be prepared to discuss the UMW Code of Conduct with those traveling and is expected to exchange emergency contact numbers with students, obtain any medical concerns students are willing to share, and obtain copies of the Student Travel Emergency Contact forms from SAE/Campus Recreation in the event of an emergency.

Student Travel Guidelines

University sponsored travel occurs when travel is required as part of membership in a recognized student organization and University funds are utilized to support the travel. Note: Funds placed on deposit with the University are considered University funds and travel using this money is deemed University sponsored travel.

Non-University sponsored travel occurs when travel is required as part of membership in a recognized student organization functioning under the auspices of the Division of Student Affairs, but University funds are not utilized to support the travel (i.e., the club members are pooling their money to pay the travel expenses). When participating in non-University sponsored travel, recognized student organizations are still required to submit a Request for Travel form which is available on the SAE web site.

If students are traveling on their own for the purpose of a recognized student organization, and University funds are being utilized to support the activity (e.g., club sports teams participating in out of town competition), the president of the student organization must meet with the Director of the appropriate office (i.e. Club sports - Campus Recreation; Student Clubs/Organizations - SAE) prior to the trip to review specific trip details. "On their own" is defined as traveling by themselves instead of with the group and/or without an advisor present.

Participants in activities involving student travel are responsible for their own behavior and any resulting consequences. The University shall not be liable for any loss, damage, injury or other consequence resulting from a participant's failure to comply with University rules and regulations, the direction of University employees, or applicable law.

Without limiting the foregoing, all trip participants are required to

(a) Comply with the standards set forth in the UMW Code of Conduct and with applicable University policies, procedures, rules and regulations, understanding that such compliance is important to the success of the trip and to the University's willingness to permit future similar activities; and

(b) Conform their conduct to the standards surrounding the trip and assume responsibility for their own actions, understanding the circumstances of an off-campus activity may require a standard of decorum which may differ from that applicable on campus. Violations of the foregoing requirements may subject participants and sponsoring organizations to disciplinary action pursuant to the University's Judicial System Policies and Procedures.

Student Travel Policies and Procedures

Pre-trip Meeting: The faculty member, administrator, or staff member traveling with the group in should hold a pre-trip planning meeting with all participants to discuss the planned itinerary, behavioral expectations, and transportation details.

Transportation: The sponsoring department should be prepared to arrange for transportation using official University vehicle(s), rental vehicle(s), chartered service, regularly scheduled transportation service, or personal vehicles. The following rules apply to the use of vehicles.

1. University Vehicles - Only approved University drivers may operate University owned vehicles. They must hold a valid driver's license, be at least 18 years of age, and complete the safety training. Make sure you review the following: http://adminfinance.umw.edu/facilities/requesting-a-state-vehicle/vehicle-use-policy/.
2. Rental Vehicles – When University vehicles are not available, a contract with Enterprise has been established allowing student organizations to rent a vehicle. All policies established by Enterprise must be complied with. The rental of 15 passenger vans is not recommended.
3. Contract Bus Service – The University has a contract for bus rentals. Please speak to a member of the SAE staff for assistance with renting a bus.
4. Regularly Scheduled Carriers - Regular scheduled transportation service providers (e.g., Greyhound, Amtrak) may be utilized for transportation. Be sure to keep all ticket stubs if you are seeking to reimburse anyone the cost of the fare.
5. Personal Vehicles - Personal Vehicles should only be used on a voluntary basis. The owners/drivers must provide their own insurance coverage. All student participants choosing to ride in a private automobile do so voluntarily and at their own risk. The University shall not insure or accept liability for any damage, loss or injury resulting from the use of a private vehicle. The University does not provide comprehensive or collision (physical damage) insurance for private vehicles driven on University business, and the owner is responsible for primary liability insurance. Accident and Medical Insurance
6. The faculty member or administrators responsible for the trip shall communicate to the participants that the University does not provide medical insurance for any student's participation in trips. All student participants shall be responsible for any medical costs they incur during and/or as a result of the trip.
7. All participants are required to engage in the planned activities of the trip. Unstructured time should be kept to a minimum to reduce the risks inherent in unsupervised activity. The sponsoring department or organization should keep a list of all participants involved in the trip.

8. It is recommended that all vehicles travel together in a caravan and that staggered departure times be avoided.

Prior to traveling, all clubs are required to:
- Complete a Student Organization Request for Travel form listing:
  - Travel Itinerary for each vehicle
  - Departure/Return dates and times
  - Destination
  - Hotel information
  - Mode of travel
  - Per diem rates for destination
- Provide a roster of who is traveling in each vehicle
- Provide a list of drivers for each vehicle
- Provide the name and contact information for the faculty/staff member traveling with the group
- Complete a University Request for Travel form if using funds from held in the club's account with UMW.

While traveling,
- All travelers must wear seat belts, and there must be a seatbelt for each passenger in the vehicle.
- Luggage must be packed so that the driver's view is not obstructed.
- All passengers must behave in a manner that does not distract the driver.
- A rest stop of not less than 15 minutes is strongly recommended every 2 hours.
- No driver is permitted to drive for more than 3 hours at any one time. A second driver is required to share the driving responsibilities beyond the 3 hour time frame.
- No student may drive a personal or state vehicle between the hours of 12:00 am and 6:00 am.

Any changes to these plans must be submitted in writing and approved by the Director/Department head of the appropriate office.

Other University Travel Policies
Whenever a student organization wishes to take an overnight trip or a day trip over $500 in the United States, they must complete the following:

- A Request for Travel form (this form is different than the SAE Travel form).
- Student Travel Emergency Contact and Conference Waiver form.

Do not reserve any hotel accommodations or purchase airline/bus/train tickets until you have received a signed copy of Request for Travel form that has all of the required signatures.

These forms are due to SAE at least 10 business days before your trip. If traveling outside of the United States, the forms must be submitted at least 20 days in advance and you must

speak with Kate Jordan in the Center for International Education. Travel outside the US to countries listed on the Department of State Travel Warning list is not permitted at this time.

1. Complete the Request for Travel form. Be sure two authorized signers for your organization sign the form. The Department Head needs to sign the form.

2. Submit the form to SAE 10 business days before your trip. SAE will review and approve it. If the hotel expenses exceed the per diem allowed, additional signatures are required.

3. Be sure to submit any related forms for your trip as well: Credit Card Request, UMW Vehicle Request, etc.

4. Complete Student Travel Emergency Contact and Conference Waiver Form and submit to SAE. Travel will not be approved until a form for each student traveling is submitted.

Forms are available in the SAE office or on the SAE website.

Hotel Reservations
When making hotel reservations, remember to check with an SAE staff member about the maximum lodging rate allowed for the area you are traveling. These rates can also be found by going to: http://adminfinance.umw.edu/ap/travel/per-diem-and-lodging-rates/.

If you make a hotel reservation and the room rate charged exceeds the State-approved per diem amount allowed for that city, you will need to personally cover this portion of the bill unless you receive permission to exceed the amount allowed. Regardless of the source of funds (club fund raiser, Finance Committee allocation or University Department budget), your reimbursement cannot exceed the per diem allowed without advance permission (which is part of the Request for Travel form).

Purchasing Airline Tickets
Many student organizations send delegates to conferences and other activities, and SAE strives to assist you as you plan your trip. If you will need to purchase airline tickets, you may do so directly from the airline, through an internet site, or with the help of SAE.

Follow these steps to purchase your airline tickets:

1. Before you begin planning your trip, be sure that you have money approved by the Finance Committee for the specific trip, or your own revenue to spend. Be sure to stay within your budget! You will not be reimbursed for expenses incurred without prior approval.

2. Complete a Request for Travel Form, available in SAE, or print one out from online at: http://www.umw.edu/documents/document/travel-request-form/

Be sure to include the approximate cost of your trip, as well as two signatures from authorized signers in your group. On the Request for Travel form make sure to include three airline ticket prices for price comparison in the appropriate spots. Make a copy for yourself and turn the form into SAE at least ten business days before you would like to begin purchasing anything for your trip (though as early as possible is best). The Commonwealth requires us to have this form completed and on file prior to the purchase of any airline tickets.

3. If you would like to purchase your tickets directly from the airline or from an internet site such as Travelocity.com, it is easiest to come to SAE and use the SAE credit card. Reserve the credit card far in advance to ensure that it is available on the date you need it.

4. If you are on a trip which will require many separate flights, or would just feel more comfortable with more help, see the SAE staff. Bring them your travel agenda and they will work with a local travel agency to get you the best deal.

5. Remember that flying is not the only way to travel long distances – when there is time and the destination is relatively close, many groups enjoy traveling by train!

Contact:
SAE Office Manager
(540) 654-1061

Event Planning

Now that your organization is official it's time to start thinking about events to sponsor. Whether it is a meeting for your members, a fundraiser, a karaoke contest, or a large concert/dance, planning events is a fun part of every organization and one that has a lot of in-depth guidelines to follow.

An Event Planning Guide and checklist which lists the steps in planning an event is available at the end of this section and at SAE. Allow two to three months of advance time to ensure your event is successful.

Starting the Process

The first thing you must do is decide what kind of event you will be holding. Examples include:

- Open Mic Night
- Concert
- Karaoke
- Talent Show
- Game Night
- Dance Party
- Poetry Slam
- Arts and Crafts
- Pumpkin Carving
- Movie

This list could go on and on. The best way to start is to brainstorm with members of your group and garner a list of events the group would like to host.

If your group needs help, come into SAE to do some brainstorming with a member of the SAE staff. There are several books in our office listing programming ideas.

Now that you have picked your event, what do you do next?

Develop your goals

Be sure your program has specific, clearly defined objectives. This is crucial if your program is to be successful. One objective may be to increase the visibility of your group on campus. Raising funds to host other programs or projects may be another.

Next, decide who your target audience is. Ask yourself: "Who do I think will attend this event?" Try to estimate your audience size – be realistic since a number of details will all hinge on the audience size.

Once you decide what you would like to do and who will attend, the next step is to determine how much money you will need to cover the expenses, and when and where the event will take place. If you are an ICA recognized group, you can request funds from the Finance Committee based on the criteria set by the Finance Committee. The "when" and "where" should consider the type of space your program needs and the campus calendar. Preview the list of available spaces by going to the SAE website and selecting the Room Reservation link. If you look at the reservations for each major venue, you will have an idea as to what is already happening on campus that day. Be sure to check the Academic Calendar as well. Events held the weekend before a break in classes may draw fewer numbers.

Every organization planning to hold an event on-campus must reserve a venue by using the Event Application Form found in OrgSync. Even events held outdoors must go through SAE and the University's reservation process. *Recognized, registered*, on-campus organizations receive priority in reserving rooms/areas on campus for meetings, events, etc. Almost every classroom and public space is available, provided that they are not already booked for a class or by another group. Rooms are reserved on a first-come, first-serve basis, so it is important to book in advance. Additionally, **all room reservations must be made at LEAST ten business days before the event so that forms may be processed correctly. Keep in mind that it takes time to process the reservation request as other departments are involved. SAE only acts as the conduit for student organizations to reserve space – we do not control the campus master calendar. If you wait to reserve space, you may increase your personal stress levels as you have to wait for a response.**

* Please see the list of maximum occupancy loads for popular spaces on campus at the end of this section.

Reserving a Room

The reservation process begins on August 1 for each academic year. This is the earliest clubs and organizations may reserve space.

There are two ways to reserve most rooms on campus for a club or organization's activities: you may complete a **Meeting Request Form** or an **Event Request Form**. Both forms can be found in OrgSync. Be sure you check the facilities schedule before submitting a request for a room or an outdoor space. This can also be found on the SAE website under the Room Reservations tab. Please note that requests to use classroom space cannot be processed until the second academic week of each semester to allow flexibility for academic departments to make class changes as needed.

Meeting Request Forms
For regular club meetings or small gatherings with no technical or security requirements, clubs and organizations may reserve rooms by submitting a Meeting Request Form to SAE through OrgSync. **Meeting Applications must be submitted at least 5 days in advance**

and again, please realize that SAE has to submit this request to another office for approval so this will take time to process. Clubs can schedule a recurring activity such as weekly or monthly meeting for a whole semester at the same time using just one form. Clubs are encouraged to schedule their regular meetings early to ensure that space is available. Be sure that every line on the form is completed so that your application can be processed in a timely manner.

Event Request Forms
For larger events on campus you must complete an Event Application Form. To ensure that your request goes smoothly, follow these steps:

1. Start the process as soon as you know when you would like your event to be. **At minimum, allow 20 business days for large events/spaces and 10 business days for small events/spaces.**

2. Have a room in mind for your reservation, but also think of alternatives in case of inclement weather or in the event that your room is unavailable. In some cases, you can reserve the room at a different time of the day either before or after another event. Most importantly, remain flexible – a room reservation that is awaiting approval will not be listed on the reservation website.

3. Meet with the SAE staff in order to complete the Event Request Form. Be sure that every blank is filled. When requesting space, consider the time and space you will need for rehearsals, dressing rooms, set-up, and clean-up. If you request a room for 3 p.m., it will be ready at 3 p.m., not before. Events may be booked back-to-back in the same space, so please be courteous of others who may be using the space before or after your group.

4. Submit the Event Request Form and all other applicable forms through OrgSync for review and approval. The SAE staff will advise you of any further steps that must be completed and submit your form to the appropriate departments. When your reservation is approved by all relevant offices (Office of Events, Police, etc.), SAE staff will send you a confirmation e-mail. **DO NOT CONSIDER YOUR RESERVATION COMPLETE UNTIL YOU HAVE RECEIVED A CONFIRMATION E-MAIL.**

5. If you are canceling an event, be sure to notify the staff in SAE in writing. Additionally, if you requested the services of Campus Police, notice must be given to SAE at least seventy-two hours prior to the event start time if you wish to avoid paying security charges. Failure to cancel the services requested may result in a charge and also may result in a decision to deny your group these services for future events.

6. When you have finished your event, please be sure to have your staff clean up the area. This is a common courtesy, and leaving a mess behind will result in a formal warning to your organization, and a possible denial of future event reservations. A good rule of thumb is to always leave an area looking better than you found it.

7. To help SAE and to help your club, please submit an evaluation of your event once the event is over.

Available Spaces

There are many facilities available for student use on campus, and some of them have special rules for use. Following are some of the main ones your group may want to consider using.

Dodd Auditorium

Dodd Auditorium, our largest auditorium venue on campus, is often used for concerts, comedians, large speakers and presentations, on-campus performance events like the Lip Sync Contest and the Performing Arts Club shows, and presentations like award ceremonies or movies.

To reserve Dodd Auditorium, you must go through the normal event application and room reservation process AND you must also contact the Director of Dodd Auditorium for approval.

Dodd Auditorium Theatre Specifications (number of seats, dimensions of stage, backstage facilities, etc.) can be requested from the Director of Dodd Auditorium.

Here is the process for reservations:

1. Student organizations will be allowed to make reservation requests for Dodd Auditorium after the first day of August each academic year.

2. You may access the Dodd Calendar in advance to see which dates are available, but reservations need to be approved by the Director of Dodd Auditorium (see contact information at the end of this section.) The Dodd calendar can be viewed at: http://calendars.umw.edu/cgibin/UMWcals/webevent.cgi?cmd=calmonth&ncmd=startup&cal=cal3

3. Start the process as soon as you know when you would like your event to be. At minimum, allow 20 business days.

4. Make sure to fill out the Dodd Auditorium Tech Rider and Multimedia Request Forms, both can be found in SAE. These are required by the Director of Dodd Auditorium.

5. The Director of Dodd Auditorium uses the Tech Rider to schedule students to work the lights, sound, projector, etc. but your organization is responsible for security, admissions, setup, and CLEAN-UP.

6. Following approval of your reservation, you should return to SAE and complete the remaining necessary procedures and forms before your event.

7. The Director of Dodd Auditorium can provide any necessary Audio-Visual equipment (i.e., DVD player and projector, tape recorder, camcorder) to Dodd Auditorium, but this must be specified on the Multimedia Request Form which should be faxed to Dodd Auditorium (x1110) AFTER your reservation is approved.

8. On a case-by-case basis for special events (such as induction ceremonies, receptions, etc.) the Office of Events may permit food/drink to be served in the Dodd Foyer. Student organizations wishing to serve food or drink must follow the UMW Dining Services Guidelines, and Sodexo must provide all food or drinks permitted by this policy unless a waiver is obtained from the Dining Services contract administrator by the Director of Residence Life to bring in food/drinks from another source.

9. The SALE of refreshments in the Dodd Foyer is NOT permitted. NO food or drink may be brought into the audience seating area of Dodd for any reason.

10. Food and drink for performers and support staff may be brought into the dressing room area. Water, in plastic containers, is permitted on the stage for performers/crew members only.

Contact:
Director of Dodd Auditorium
540-654-1235

The SAE Conference Room

The SAE Conference Room, located in the SAE office in Seacobeck Hall. It is a small room designed for small meetings, interviews, etc. To reserve the SAE Conference Room please contact the front office in SAE to set up a time. Space is available on a first-come, first-serve basis. Capacity is 20-25 people.

Contact:
SAE
540-654-1061
SAE@umw.edu

Residence Halls

Many groups enjoy using space in the Residence Halls for smaller, more intimate meetings and events. Popular spaces include the Link between Randolph and Mason, Virginia and Ball Parlors, and various study lounges throughout the campus.

Residence Hall staff and Hall Councils are given priority when requesting residence hall space, so plan ahead and always have an alternate date and location prepared.

1. All organizations, even if you are requesting a space on a routine basis, must request the use of Residence Hall space through Residence Life.

2. Please make sure to clean up from your event when you are finished. Inappropriate use of residence hall lounges, defacement of property or failure to return the lounge to a reasonably clean condition will result in a charge back to your organization for cleaning and/or repairs and your organization's loss of event reservation privileges.

Contact:
Director of Residence Life
(540) 654-1058

Goolrick

The Auxiliary Gym in Goolrick Hall may be reserved in one-hour blocks for student organizations after the second week of each semester. To do so, make your request in writing to the Director of Athletics. Events taking place in the Auxiliary Gym must be physical or athletic in nature. Charges for desk aides will apply for events that extend beyond the normal hours of operation of Goolrick Hall. Housekeeping charges may apply in the case of large events. An UMW student may host one guest when using the facilities in Goolrick Hall from Thursday evening at 6 pm. until building closing on Sunday. Guest passes are only available from the Police Station in Brent House, and must be presented to the Goolrick Hall desk aide upon entry.

Contact:
Director of Athletics
(540) 654-1876

Amphitheatre

The Amphitheatre is currently not available.

The Underground

The Underground, located in lower Lee Hall, is also a great location to hold events. Applications for use of this space must be made submitted to the Director of Student Activities and Engagement. Keep in mind that Dining Services operates the kitchen in this space which means you cannot bring in outside food or beverages. Programs will be considered based on the programming model which has been established by the University Programming Committee. Programs proposed for The Underground on the weekends should have a broad appeal to the campus community.

Classrooms

The following buildings have classrooms available to students for meetings and events:
- Trinkle
- Combs

- Jepson
- Monroe
- Pollard
- Melchers

To reserve classroom space, fill out an Event Application Form or a Meeting Application Form as appropriate and submit your request through OrgSync. Keep in mind that while events are listed on the campus calendar, classes are not. Clubs and organizations can request to use classroom space after the second week of the semester.

Police Officers/Security for On-Campus Events

If money is collected at the door or during an on-campus event, or the event is open to the public, student groups may be required to have an SAE staff member and campus police officers in attendance. Organizations have found it useful to have campus officers present to maintain order, protect those individuals responsible for the collection of cash, and prevent theft.

For events where the expected cash collected is less than $500, student organizations are not required to have an officer present as long as they submit a detailed plan to the Director of Student Activities and Engagement as to how they plan to protect the individuals collecting cash and control the flow of cash collected. For events where the expected cash collected is $500 or more, an officer is required. When filling out an Event Reservation Request, you will be asked if a police officer is needed at your event. There is an hourly charge for hiring a campus police officer, with a three hour minimum.

Contact:
LT Hall, UMW Police
(540) 654-1025

Sound Tech and A/V Requests

If you plan to have a speaker, DJ, singer, band, or other performer that requires sound amplification at an event, you will need to contact sound tech crew through OrgSync, during the Event Planning meeting with a member of the SAE staff. The members of the sound crew will set up equipment based on the information you provide. To reserve the assistance and equipment, you need to **submit a Sound Tech Crew Form at least fourteen days before your event. If you are planning to have a performer on stage, you MUST submit a copy of the artist's tech specifications. Your request will not be reviewed until this is submitted as this document will determine the number of staff members needed as well as the equipment**. The crew works on a first-come, first-served basis. Completion of the form or checking the box on your room request does not guarantee the services of the Sound Tech Crew. Please note that musicians and DJ's will be responsible for bringing their own cables to connect to the soundboard. Make sure you have the room reserved well in advance as well. Note: The Sound Tech Crew does not provide service in classrooms or in Lee Hall 411/412.

Contact:
SAE
(540) 654-1061

Use of Stages

SAE has a heavy-duty stage that can be used for events such as concerts and dance recitals. Groups interested in using the stage must indicate the stage size needed during the Event Planning meeting and must submit an Equipment Rental Form through OrgSync. They must also coordinate both build and tear-down times with the SAE Program Coordinator. A member of the SAE professional staff must be present during the build and tear down both to assure the safety of the students and to assure the stage is built correctly. The group must provide a minimum of 10 volunteers to move, erect, and dismantle the stage. This will assure the stage will be put up in a timely manner and that no one individual will be over-taxed while moving the stage pieces. All tear-downs must be completed within one business day of the event. Groups will be charged for any costs attributed to their failing to take down the stage and put it away properly. A permit to put the stage up has been purchased. To obtain the permit, the stage size, location and height had to be pre-determined. Any deviations in this will require the user to obtain an additional permit.

Contact:
SAE
(540) 654-1061

Club and Organization Social Event Planning Procedure

Student Clubs and Organizations that wish to hold events on-campus where alcohol is available must adhere to the following procedures. Note that due to the nature of their events, the only student group approved to offer alcoholic beverages at off campus events is Class Council.

To begin, the event must be approved by the Office of Student Activities and Engagement.

- The Club/Organization leadership must meet to discuss the event with the Director, Assistant Director or Program Coordinator using the following criteria:
  - a minimum of 1 month prior to the event date for on campus programs
  - a minimum of 3 months prior to the event date for off campus programs

On-Campus

- The Club/Organization's representative shall meet with Dining Services to discuss the catering contract. Once you have determined what you will be serving, a copy of this contract must be sent to Becky Bezdan in SAE for approval and payment. A Business Meal Form must also be completed at this time.

All alcohol service must be provided by Dining Services as they are the licensed vendor for our campus.

- o During this conversation, the following must be addressed with Dining Services:
  - State funds cannot be used to pay for alcohol or any other alcohol-related expenses (i.e., bartenders)
  - Dining Services will be responsible for checking the ID's of all who are in attendance and for issuing wristbands. Student organizations are responsible for providing Dining Services with a way to differentiate those who are over 21 and those who are under 21. The use of two distinct wristbands is recommended. Placing a mark on someone's hand is not sufficient.
  - Dining Services will not serve or provide a wristband to anyone who, in the estimation of the staff of Dining Services, is viewed as noticeably intoxicated.
  - Student clubs/organizations must provide food and non-alcoholic beverages at the event.
  - Students will not be permitted to bring their own alcohol to the event. Alcohol service must be provided by Dining Services.

- Club/Organization must provide UMW Police at event for the safety of all students.
  - o The number of Police Officers can be negotiated depending on the planned or estimated number of people that will be in attendance. The cost of this service is paid by the club/organization hosting the event.

- Club/Organization must provide a minimum of 4 sober students and professional staff chaperons to assist with crowd control. Selected students and staff may not consume alcohol at any time during the event. A list of these individuals must be submitted to the Director of Student Activities and Engagement prior to the event, and to the Event Catering Manager on site the evening of the event.

Off-Campus (for Class Council Only – Spring Formal)

- Class Council will work with the catering department of the venue.

  - o During this conversation, the following must be addressed with the vendor:
    - State funds cannot be used to pay for alcohol or any other alcohol-related expenses (i.e., bartenders)
    - The vendor will be responsible for checking the ID's of all who are in attendance and for issuing wristbands. Class Council will be responsible for providing the vendor with a way to differentiate those who are over 21 and those who are under 21. The use of two distinct wristbands is recommended; placing a mark on someone's hand is not sufficient.

- The Vendor will not serve or provide a wristband to anyone who, in the estimation of their staff, is viewed as noticeably intoxicated.
- Class Council must contract with the vendor to provide ample food and non-alcoholic beverages at the event.
- Students will not be permitted to bring their own alcohol to the event. Alcohol service must be provided by Dining Services.

- Class Council must provide adequate transportation (bus) to and from off campus venue.
  This also includes a minimum of 2 sober students and 2 professional staff chaperons to ride on each bus and during the event. Selected students and staff may not consume alcohol at any time during the event.

- Class Council will work with UMW's Police Department to do the following:
  - Check ID's before leaving campus unless arrangements have been made for the vendor is managing this process.
  - Not allow anyone who appears to be intoxicated on the bus.

Food/Non-Alcoholic Beverages
The University of Mary Washington has an agreement that requires all groups associated with the University to work with the University Dining Services on any event involving food that must be prepared, or kept hot or cold. Food that is pre-packaged (i.e., bagged, bottled, boxed, or canned) in individual use containers may be purchased at off-campus locations. The University of Mary Washington also encourages student organizations to utilize Pepsi products, the University's contracted beverage vendor. If you can find a cheaper source elsewhere, it is permissible to use products other than Pepsi. Other beverages not carried by Pepsi, such as coffee, tea, etc., may be purchased from other vendors as desired.

To order Pepsi products at a discounted rate, please follow these guidelines:
1. Contact SAE via e-mail at least 15 working days in advance to place your order.
2. Provide your organization name and account number to charge. Business Services will send the bill directly to Accounts Payable and the funds will be transferred directly from your account. To obtain the current prices for Pepsi products, contact the Eagle One Office in Lee Hall.

Contact:
Eagle One Manager
(540) 654-1005

Partnership with the Catering Department

The University of Mary Washington has a partnership with the Catering Department for catering that all organizations must follow. Please review these important guidelines before planning your event:

1. Any event that includes a food item that must be prepared, kept hot or cold MUST be ordered through the catering office. Food for events that require only convenient, pre-packaged food (i.e., bagged, bottled, or canned) may be purchased at off-campus locations, but must be approved and given a waiver.

2. Any organization planning to order food for an event being held anywhere on campus has two options to choose from: a Full Service Event or a No Frills Event. Procedures and information are listed below for each type of events.

   Important Note: Regardless of your funding source, you must contact Catering Services at least ten business days prior to the desired service date. Failure to request food service at least ten business days in advance may result in a denial of permission to have food at the event, use of the University Credit Card to purchase food elsewhere will not be permitted, nor will reimbursement be made to an individual who purchases food with his or her own money.

3. Exceptions to the above policy are long-standing traditional events that utilize off-campus food vendors. These events are: Rocktoberfest, Devil Goat Day, Community Welcome Fair (new student orientation), the Multicultural Festival, Taste of Asia, Club Carnival, EagleOne Vendor Taste Tests, and meals for performers (per entertainment contract). Clubs should use Vocelli's when ordering pizza.

4. Any requests for additional exceptions to any of the above policies must be presented to the Director of Residence Life who will review the request in conjunction with the Dining Services General Manager and the Director of Business Services.

"Full Service" Catered Events

1. Four weeks prior to your event, contact the Catering Office at x1930 or at www.umwcatering.com under the University Catering option. During this initial contact you may place an initial order for your event, or speak to a catering consultant regarding the order. Custom or specialized menus can be developed to suit your particular event.

2. Student organizations will receive a 5% discount on Full Service Catered Events. All final counts are needed at least 72 hours in advance. The administrative assistant in Catering can answer questions and work with you on available dates, menus, planning timelines, and room availability.

3. Student organizations may reserve the Faculty/Staff Dining Room through the Catering Office. There is no charge for the room as long as you order food from Dining Services. However, if your setup is very different from the general room arrangement, there may be a fee – be sure to ask the staff in Dining when you make your reservation.

4. If your event is taking place on campus, your organization must also include the date, time and place to set up and clean up the food for your group. Give the caterers

at least one hour before the event for proper set up. You are responsible for ordering tables and setup of any rooms other than Faculty/Staff Dining Room. Please contact Facility Services at x2078 to make these arrangements.

5. The catering office will contact you with any questions regarding your event. A contract will then be e-mailed to the events contact person for approval. You must complete the process through SAE for final approval.

6. Take the catering contract and a completed Business Meal Form to SAE for review at least four business days before the event. SAE staff will sign and send the contract and billing information to the Catering Office. This information must be on file with the Catering Office prior to the event. The Catering Office will not be able to service an event unless you have completed this process.

7. Your bill will be charged to the SAE credit card and the funds will be transferred from your account.

"No Frills" (Pick Up) Catering Events
This option is for use by student organizations which are registered with the SGA or Student Activities Office and is to be used when you want No Frills Pick Up Catering. To expedite your order, please use the following procedures.

Ordering Food:
1. Contact the Catering Office at x1930 or e-mail to catering@umw.edu to discuss your needs and obtain a No Frills Order Form. Allow at least 10 business days (M-F) prior to your event to complete the form.

2. The Catering Form may be e-mailed or dropped off at the catering office located in Seacobeck Hall. If you e-mail your form it will be followed by a confirmation from the Catering Office within 48 hours. If you do not get a response within 48 hours, you may contact the office at x1930. If you drop the form off to the Catering Office, you will receive a confirmation with our signature. The Catering Office is open Monday-Friday 8:30am-5:00pm.

3. In order to serve you best and provide you with the items you have requested, orders need to be finalized at least 5 business days prior to the event. Requests made after the 5 business days will not be guaranteed and substitutions may be necessary.

SAE Process:
Take the catering contract (No Frills Order Form) and a completed Business Meal Form (must be signed by 2 authorized club signers to be considered completed) to SAE for review at least four business days before the event. SAE staff will sign and send the contract and billing information to Catering Office. This information must be on file with the Catering Office prior to the event. The Catering Office will not be able to service an event unless you have completed this process.

Your bill will be charged to the SAE credit card and the funds will be transferred from your account.

Pick Up of Food, Supplies & Equipment:
Upon receipt of the food item, the student organization member is required to check for all items requested and initial the form to confirm receipt.

Food items are to be picked up at the Seacobeck kitchen.

Costs for grills are as follows: Grill only $35, Grill with Delivery $60.

Disposable Equipment such as chafing dishes to keep food hot and utensils to serve food will be priced into the contract.

Contact:
Catering Office
(540) 654-1930
catering@umw.edu
http://www.umwcatering.com/

Business Meal Policy

Anytime a student organization is using funds from an on-campus student organization account to buy food, a Business Meal Form must be completed and submitted to SAE along with a catering contract or credit card approval form. All forms should be completed and signed by TWO authorized signers on your account as well as the Director of Student Activities and Engagement before anything is purchased.

When completing a Business Meal Form, be as descriptive as possible when noting the purpose of the meal. Rather than writing "meeting," write "Refreshments for reception encouraging interaction between club members and faculty." The "names of people attending" section must be a specific list of those members attending. If the event is large and open to the entire campus, write "Open to Campus".

In the case of off-campus meals, the meals must be essential to the organization's purpose and approved by the Director of Student Activities and Engagement. **Current meal limits for some popular destinations, which include taxes and tips (alcoholic beverages may not be included) apply as follows (these are subject to change at any time without notice):**

	Breakfast	Lunch	Dinner
Fredericksburg/Richmond/ Stafford/Prince William	$9	$13	$29

Washington, D.C./Arlington/ $12 $18 $36
Fairfax Counties

Other locations   E-mail payables@umw.edu or call ext. 1226

Gratuity in excess of 20% of the meal expense **before taxes** are added in is not allowed. Before leaving a tip, verify that it has not been automatically added. Any meal amount (to include gratuity and taxes) in excess of the stated limits is the responsibility of the purchaser.

Completing a Contract Packet

Any time your organization wishes to make an agreement with a speaker, band, DJ, or other performer you must have a signed contract. This is always true regardless of whether you will be paying the performer or if the individual is donating products or services.

There are three parts to the Contract Packet (available in the SAE office): the Contract, the Vendor Registration form, and an Invoice. The performer and the Director of Student Activities and Engagement must sign the contract. The Vendor Registration form should be included whenever the performer is new to working with UMW. A W-9 may be substituted for the Vendor Registration form.

1. Always let SAE know you plan to complete a contract packet. The process must begin no less than 20 business days before the event – the sooner the better.

2. Some companies or individuals may have their own contracts. If they do, ask them to send a copy to the Director of Student Activities and Engagement for review. It must meet state guidelines before being used. If the performers own contract is used, a University Addendum document must be attached and signed by the performer and the Director of Student Activities and Engagement.

3. Any funds being used as payment must already be in your account. Payments may not be made on the hope that ticket sales will cover the cost.

4. Deposits may not be paid by any UMW student organization to any vendor.

5. Complete all items of the contract, as well as the attached addendum. If needed, the addendum must always be included if the standard UMW performer contract is not used.

6. Mail, fax, or deliver an unsigned copy of the contract packet to the vendor and have them sign it. If the vendor has multiple members, the signature of one member is interpreted to be inclusive of the entire group. If the University has never done business with your particular vendor, you will also need to have them complete the Vendor Registration form.

7. Request the performer or their representative mail or deliver the original contract packet back to you no less than 10 business days before payment is needed. Be sure to allow ample time for this process.

8. The Director of Student Activities and Engagement will review the contract packet again and sign it. SAE must be the last office to review and sign the contract. **Students are not allowed to sign contracts.**

9. Once the Director of Student Activities and Engagement has approved and signed the contract packet, a copy will be returned to you. Be sure to send a copy back to the performer or their representative.

Important: A performer or their representative may request to use his or her own contract. In this case, be sure that the Director of Student Activities and Engagement is able to review it before any agreement is made. If the performer contract is used, the vendor and the Director of Student Activities and Engagement must sign the addendum.

Showing a Movie on Campus

The Federal Copyright Act governs how movies may be used publicly. While you may rent or purchase or borrow a videocassette or DVD, the right to show this publicly does not come with it. This legal requirement applies to colleges and universities **regardless of whether or not admission is being charged**. The movie studios who own the copyrights and their agents are the only parties who are authorized to license the showing of movies. Privately owned movies and movies borrowed from other sources such as public libraries, college collections, and individuals cannot be legally shown without obtaining the license to do so.

To show a film for entertainment purposes on campus your group must obtain permission from the copyright owner or obtain a license. One source is SWANK Motion Pictures. By renting your movie from SWANK Motion Pictures or another company that rents to college campuses, you are buying the license to show the movie in a public setting. Prices to rent a movie from SWANK range from $200-$1000 depending on the movie's release date and its popularity. To purchase the rights to show a movie publicly, contact SAE at x1061. If you have any questions regarding this policy, please stop by and speak with one of the staff members here in SAE.

Rooms may be reserved on campus to show a movie but the reservation may be canceled if the group does not produce documentation that they have purchased a license. Equipment to show a movie on, such as TVs, LCD projectors and more is available in most classrooms. To use the outdoor equipment from SAE, please complete a Sound Tech Request in addition to your Event Request.

Educational Exemption for Video Screening

Under the Educational Exemption, copyrighted movies may be shown on campus without a license only if the movie exhibition meets **all** of the following:
- The exhibition is an integral part of a class session and is of material assistance to the teaching content.
- The exhibition is supervised by a teacher in a classroom.
- The exhibition is attended only by students enrolled in a registered class.
- The exhibition is lawfully made using a movie that has been legally produced and obtained through rental or purchase.

This Exemption is given to teaching faculty and does not apply to student organizations. There are fines assessed for showing movies without obtaining the right to do so and these become the personal responsibility of the person who scheduled the event. The legal system also has the ability to assign jail time up to 5 years for each offense. In general, it is safest to assume that the display of a movie is legal only if it is used by an instructor under the Educational Exemption, or if a student has rented or purchased the video, it is shown in the privacy of your residence hall room or apartment.

Decorations and Fire Safety

Many groups choose to use decorations for holidays, dances, and events. Anytime you do extensive decorating or use any kind of flame-producing item, you must consult with the UMW Director of Emergency Management and Safety at least 10 business days before the event.

Please abide by the following guidelines when planning your event:
1. Absolutely no indoor pyrotechnics, fog machines, or flame producing items – either in or out of doors. This includes tiki torches.

2. Natural trees are prohibited in student rooms and in areas of public assembly (areas where 50 or more people may gather for a purpose).

3. Artificial trees need care in selection and handling. Plastic trees can burn. Use the type clearly marked as made from slow burning materials. Those with built-in electrical systems should carry the Underwriter's label (UL). Metal trees may be a shock hazard. Use only indirect lighting with them. If lighting strings are placed on a metal tree, the tree may become electrically charged. Never use electric lights on a metal tree.

4. Use noncombustible decorating materials (metal, glass, etc). Untreated cotton batting, flock, and paper ignite easily and may burn intensely. Use only flame-retardant or noncombustible materials for costumes and decorations. Crepe paper and streamers must be labeled as "fire-proof" or "flame-proof." Be sure to read the label before you buy the material. Plastic bags and plastic sheeting may not be used for decorating–this material is very combustible.

5. Keep exit corridors and doors free of decoration to reduce confusion and obstacles to exit in the event of emergency evacuation.

6. Cover no more than 20 percent of any available wall with decorations. Do not block or cover fire alarm pull stations, emergency lights, exit lights, hose and extinguisher cabinets, or any part of the sprinkler system. Regular corridor lighting must not be completely covered. Keep decorations at least 10 feet from exit doors.

7. Corridors must not be "wall-papered" with combustible materials. Combustible decorations are not permitted in stairwells.

8. Do not string decorations down from corridor ceilings. They can act as fuses if ignited.

9. The use of lighted candles or any open flame is not permitted in any University of Mary Washington campus buildings, with the exception of candles for religious services. See the Director of Residence Life for an exception. Safe alternatives include flashlights and battery-operated candles.

10. Because of their combustible nature, corn stalks, leaves, and hay may not be used for decorating. Other natural materials such as pumpkins, squash, and gourds are permitted.

11. Electrical decorations should be UL listed. Equipment should be checked for frayed cords, loose connections, and broken sockets. It should be unplugged when your program comes to an end.

12. Make sure all indoor and outdoor holiday lights are UL listed.

13. If an electrical appliance smokes or has an unusual smell, unplug it immediately and have it serviced.

14. Any event that will have more than 25 people in attendance must be reviewed by the Safety Office. Please contact the UMW Safety Office at least 10 business days in advance of event.

Contact:
Director of Emergency Management and Safety
(540) 654-2096

Steps in Planning an Event

In the beginning pages of this section, we discussed creating a vision and an action plan based on that vision. Now that you have a clear concept, use these steps to execute your event:

3-4 weeks minimum before your event:

1. Meet with the Graduate Assistant, the Program Coordinator, the Assistant Director, or the Director of Student Activities and Engagement about your event. They are a great resource for students and organizations new to programming. Contact them at SAE@umw.edu or by calling x1061. **If you use any equipment from SAE you MUST MEET with an SAE staff member.**

2. Set a date and time for your event. To see if your preferred space is available, check the Facilities Reservation Calendar linked to the Room Reservation page on the SAE website. Include enough time for cleanup of the space, particularly if it is being used by another group that day.

3. Create a budget for the event.

4. Fill out an Event Request Form, available on OrgSync. For outdoor events, you should also request an alternate space indoors in case of bad weather.

5. Complete a Sound Tech Request for sound and lighting equipment. The form can be found on OrgSync and must be submitted during the Event Planning meeting and at least 14 days in advance of your event so that a tech can be scheduled. There is a limited amount of equipment, so submit your request well in advance or equipment may not be available and you will need to pay for a rental from an outside source. **Completion of a Sound Tech Request form does not guarantee the sound crew's ability to meet your needs. You will be contacted by a Sound Crew Coordinator to discuss your event and confirm availability.**

6. Work with the SAE staff to borrow any equipment SAE may have. If you are using any SAE equipment, submit the Equipment Rental Form through OrgSync during the Event Planning meeting. Some of the equipment available from SAE includes: Pop Corn Machine, Sno-Cone Machine, Coolers, Water Jugs, Tents, Buckets, Screen, Projector, DVD / VHS Player)

7. Using the budget you created, submit your applications for funding to the Finance Committee in time to successfully plan your event. Be sure to make your request well in advance. The Finance Committee will not consider requests that are received within 2 weeks of the event date. Applications may be found on the Finance Committee and SAE websites.

8. Check with SAE to see if there are any specific policies that apply to your event.

9. Secure co-sponsors and/or volunteers for the event. Co-sponsoring with a student organization or a department will help spread the work around and get you the volunteers needed to get the job done.

10. If applicable, request an officer from Campus Police. This may be required if you are collecting any money. There is an hourly fee with a three hour minimum.

11. Fill out an equipment rental form on OrgSync to request outdoor staging. This may require a permit from the Commonwealth 30 days before event and a payment to the State for the permit.

1-2 weeks minimum before your event:

12. Confirm your reservation for your event spaces. Check the Events Calendar through the link on the SAE Website or contact SAE at x1061.

13. Develop a plan regarding the number of volunteers needed and what you would like them to do. No one likes to be asked to help and find they are just sitting around when they arrive to assist with an event.

14. Effectively advertise for your event/program. Make sure your volunteers are aware of University posting policy and that they follow it.

15. Check on the status of your Sound Tech Request for sound and lighting equipment.

16. Complete any work orders for services from Facilities (electrical power, trash cans, recycling bins, delivery of tables and chairs, etc).

17. Look at your plans to see if you need a campus vehicle (passenger or cargo van). If needed, be sure to complete a Vehicle Request and bring to SAE for signature.

18. Rent equipment from vendors (i.e., inflatables, dunk tank, etc.). Make sure the company carries liability insurance (you need to ask for a copy of their certificate if the University does not already have one on file). Be sure to work with the SAE staff to contract for any of these services.

19. Have your contracts reviewed and signed by the Director of Student Activities and Engagement. (Students are not authorized to enter into a contractual agreement).

20. Contact Catering Office to order the food you are planning to serve at your event. Be sure to discuss your plans for refreshments when you meet with the SAE staff.

21. Secure lodging, special meals, transportation, or any other items listed in the contract or rider for the vendor/performer. Don't forget to do a Business Meal form for any food/meal purchases. A Request for Travel and Travel Reimbursement form may also be required if we are reimbursing the vendor/performer for travel expenses. (These forms can be found in the office of SAE)

22. Request checks for the vendors/performers. If the person/company being paid is not already in the UMW system, a Vendor Registration form is required.(Form can be found on the UMW website)

23. Pay the royalties on the movie you will be using at your event. See the "Showing a Movie on Campus" section for more information.

24. Work with the Finance Technician in SAE to obtain decorations.

25. Review the Gift Policy if giving away any prizes or gifts. Virginia State regulations require a Gift Log must be submitted for any items given away at your event. For more information contact SAE at x1061.

After your event:

26. Return the space the way you found it.

27. Complete the Gift Log if you gave away any prizes or gifts and turn this in to SAE.

28. Write thank-you notes to volunteers and performers.

29. Complete the SAE evaluation to assist you in next year's program.

Procedures for Awarding Prizes

Monetary prizes – Gift cards, EagleOne, Cash/Checks
Gift Cards
    Complete the first page of the Gift Log form
    Have the winners complete the 2nd page of the Gift Log form **at the event**
    Write the gift card number on the Gift Log form
    Attach a copy of the store receipt
    Turn in the Gift Log form and a copy of the store receipt to SAE

EAGLEONE (only available for UMW students)
    Complete the first page of the Gift Log form
    Have the winners complete the 2nd page of the Gift Log form **at the event**
    Winners must indicate their Banner ID# and the amount won on the Gift Log form
    Turn in the Gift Log form to SAE

Cash Prizes/Checks
    Cash prizes will be awarded in the form of a check and mailed to the winner
    Have each winner fill out a Vendor Registration form **before leaving the event**
    The club responsible for the event must complete a Pink Direct Pay form for each winner
    Two authorized club signers will sign each Pink Direct Pay form to approve the payment

Bring a packet to SAE containing the Vendor Registration forms and completed Pink Direct Pay forms for each winner

Checks will be processed by Accounts Payable and mailed to the winners

Non-monetary prizes
Items costing less than $50:
Fill out the first page of the Gift Log Form
Attach a copy of the store receipt(s)
Turn in the Gift Log form and a copy of the store receipt to SAE

Items costing $50 or more:
Fill out the first page of the Gift Log Form
Have the winners complete the 2nd page of the Gift Log form **at the event**
Attach a copy of the store receipt(s)
Turn in the Gift Log form and a copy of the store receipt to SAE

REMEMBER – this is your organization's event. Prize winners should not be directed to come to the SAE office to complete the required paperwork or to pick up their prize.

Why Programs Fail

Ever wonder why some programs are a huge success and other aren't? Here is a list of possible pitfalls to avoid.

1. Poor Publicity – not eye catching, not enough of it, not enough advance notice to the community about the event, not creative or informative, too cluttered, poorly located, offensive.

2. Poor Program Design – no goals, not enough input from other students, didn't identify target group, not well planned.

3. Wrong Location – too far from the dorms, not comfortable, too cold, too many distractions, student unfamiliar with the room name (especially in September), or location changed and the campus community was not effectively notified.

4. Poor Facilitator – poor interpersonal skills, poor speaker, not knowledgeable.

5. Unprepared Facilitator – lack of agreement on the topic, doesn't show up, different expectations as to audience size, not enough time to prepare, late.

6. Murphy's Law – things go wrong, equipment doesn't work, the building didn't provide enough power, poor performance, room not set up in time, volunteers don't show, your group ran out of money or didn't get the performer's check, tech crew was unaware of needs and we don't own the required equipment.

7. Program Runs Too Long.

8. Didn't Follow University Policies and Procedures.

9. Timing – didn't check the master reservation calendar to see what else was happening, didn't take student trends into consideration, didn't consider ALL religious holidays and celebrations.

10. Forgot to Gain the Support of Friends and Colleagues.

Think about it and remember – the key to a successful program is to plan well in advance for every contingency!

Services Provided by SAE

Need help with your event? The staff in SAE is here to assist you with:
- Program planning (brainstorming session – what do you want your event to look like).
- The completion of an event or meeting (space) request.
- The completion of all work orders and vehicle requests.
- The request for the President of UMW to attend your event.
- Requesting Campus Police presence.
- Requests for reserved parking for your event.
- The request for lighting and sound equipment.
- Gift Policy.
- Completion of all contracts and related forms.
- Credit Card reservations.
- Payment of performer.
- Fax machine if needed.

Contact:
SAE
540-654-1061

UMW SAE Event Planning Checklist

This checklist is a tool to help you plan a successful event. Please know that due to the wide variety of events possible, the checklist may not include every step in your planning process. If you have questions please come into SAE and speak with one our staff members – we're here to help you host a successful event!

Name of Event: _____

Date of Event: _____   Start Time: _____   Location: _____

Event Purpose: _____

☐ Brainstorming: (you should start this 1-2 months in advance)
  Determine type of event:
  - Comedy Show
  - Concert
  - Conference
  - Dance
  - Festival
  - Lecture
  - Outdoor Activity
  - Panel Discussion
  - Other: _____

☐ Does the event serve a need not otherwise met on campus?   Yes / No

☐ Projected Target Audience: Estimate the number of people in each category (if they apply) and enter the number on the line after the category type.
  - Undergraduates ___
  - Faculty / Staff ___
  - General Public ___
  - Graduate Students ___
  - Children ___
  - Volunteers ___

☐ How many volunteers do we need to make the event happen? _____

☐ Should this event be Co-Sponsored?   Yes / No   If yes, list group(s):
_____

☐ Do we have the resources to make it happen? Consider finances, time, volunteers, etc.
Yes / No

☐ Will we charge admission?   Yes / No   If yes, how much? Use this info as you develop your budget. _____

Now that you have figured out what kind of event you will be programming, take these steps to make sure it happens:

1. **Scheduling:**
   ☐ Check the Campus Event Calendar to find which dates are available.

☐ If applicable, check with your club/performer to decide on the best date for your event. You might get a better rate if performers are already traveling through the area.

☐ Reserve your space by submitting the Event Request Form through OrgSync.

☐ Schedule a meeting with an SAE professional staff member to discuss the event.

Remember: If you are cancelling an event, send an email to SAE as soon as possible so that other groups can use the space and the student staff scheduled to support your event can be re-assigned.

2. **Logistics:** Meet with a staff member in SAE to discuss your event and complete the paperwork needed:

☐ Submit a Sound Tech Request through OrgSync during the Event Planning meeting.

☐ Submit Work Orders for services provided by Facilities: Trash Cans, Electrical Power, etc.

☐ Submit Equipment Rental Form for any equipment you want to borrow from SAE through OrgSync during the Event Planning meeting.

☐ Submit your request for Police Presence (Police must be present if you are collecting any money).

☐ Submit a President Request Form if you want him to attend -- the earlier the better since his calendar tends to book up).

☐ Fill out proper contract forms (Performer's Contract, UMW Contract Amendment and an Invoice – see Office Manager in SAE for help with these; ask her if you need to complete a Vendor Registration form).

☐ Discuss what else needs to be rented, bought, or borrowed.

☐ If you are showing a movie, find out what the cost of movie license will be. If the cost is feasible, work with the Office Manager at SAE to order the movie for delivery prior to your event date.

☐ If you are giving out prizes, be sure to go over the Gift Policy with the SAE Office Manager and obtain a Gift Log.

☐ Talk to Dining Services to get a quote for a catering contract.

☐ Sign up for the credit card for local purchases (if applicable).

3. **Budgeting**: When you request funds, some of the questions the Finance Committee will have are:

☐ Have you received a quote for food from Dining Services?

☐ Have you received a quote for any contracts you will be negotiating?

☐ Do you have the space reserved? (Required for Finance Committee consideration!)

☐ Submit your Budget request to the Finance Committee a minimum of two weeks before event.

- Applications are due by 4 pm the Thursday before you wish to go to Finance Committee.
- If you need help with your Budget Request, see us in SAE.
- If your budget is over $5,000.00, the budget is due 4 weeks before event.

- Review the Finance Committee policies which can be found in the SAE Policies and Procedures Handbook (on line at www.umw.edu/SAE).

4. 1-2 Weeks leading up to event:

☐ Reserve a Credit Card if you haven't already – be sure to fill out the purchase agreement form and get 2 signatures from your club's authorized signatory list.

☐ Contact Facilities Services to confirm setup, trash cans, and electrical power if your event requires these from facilities services.

☐ Look at UMW Event Calendar or Contact SAE (SAE@umw.edu) to confirm your space reservation.

☐ Confirm Sound Tech Request.

☐ Confirm all contracts, invoices, and payment forms have been given to SAE.

☐ Have SAE approve your publicity and spread it all over campus – be sure to post on bulletin boards only and please don't use chalk on the sides of buildings (sidewalks are okay but you may be asked to wash it off depending on other campus events).

☐ Confirm Catering Request in Dining Services.

5. Post Event Planning:

☐ Make sure location looks the same as you found it.

☐ Submit all receipts to SAE Office Manager. Be sure to make a copy for your club's records.

☐ Return Gift Logs if you gave out any prizes.

☐ Send written thank you notes to volunteers and Performers.

☐ Complete Event Evaluation.

Working with Other Organizations

Other student organizations are one of the greatest resources available to your group. Not only can they provide you with contacts for community service, booking bands and Performers, renting movies, and equipment, but other clubs/organizations can join with you to co-sponsor large-scale events on campus. Co-sponsored events provide a unique opportunity for more than one organization to share resources, as well as costs and duties, and present the campus with fun and interesting events.

Listed below are a number of the major organizations on campus, all with student offices in the SAE suite, together with their organization's purpose and some events that they sponsor. All organizations are available for questions regarding specific events or duties. If you are unable to find individual contact information, please call SAE or drop by for a visit!

Ideas for Co-Sponsorship

Program co-sponsorship is one of the best outreach tools available for strengthening a sense of community on campus. Through co-sponsorship, two or more organizations agree to jointly participate in producing a program. Each group brings with them a variety of strengths and areas of expertise which will only enhance the overall event and result in a great program! Publicity techniques, event goals and objectives, creativity, budget, program implementation and attendance are all positive outcomes of a co-sponsored event.

As you look to co-sponsor event, be sure of the following:

- Define the program – what type of event are you looking to host, who is your intended audience, what will the event include, when will it take place, where will it take place.

- Identify who will be responsible for what – publicity, event planning, event implementation, event evaluation, budget development and oversight, and end of the program thank you notes.

- Establish a budget and determine which group will be responsible for each of these expenses. Decide what you will do in case the expenses are greater than the funds available.

- Determine who will be responsible for making the final decisions.

- Discuss how you will handle conflict (as a precaution).

The University of Mary Washington has more than 130 different clubs and organizations that can work with you in creating an amazing event. Give it a try! You'll be surprised at the overall results! Below are listed several campus organizations that may be potential partners for your group's events or activities.

Community Outreach and Resources (COAR)

Many student organizations utilize COAR throughout the year to find service projects that fit the needs of their group. COAR can help coordinate a service project specific to your organization's or individual needs. In addition, there are many special events hosted throughout the year by COAR that your group can participate in. Educational programs, group training, reflection and evaluation are all integral parts of any service-learning project. The members of COAR are available to assist in the development of any comprehensive community service project.

Setting Up Your Project with COAR

If you are interested in setting up a group project with COAR, begin by calling or dropping by the COAR office. A staff or council member will be happy to point you in the right direction for your particular project. All COAR Council members and staff members work closely with community agencies to promote and facilitate volunteer activities with UMW students. If you are unsure of what type of service project you would like to do, COAR members will try to find one that meets your needs or those of your organization. COAR can help set up projects doing everything from activities for area children to walking dogs at a local shelter, or from river clean-ups to preparing meals for local shelters.

Different projects will require different paperwork and guidelines to be followed. (i.e., you will not need to go through background checks to clean up local parks, but you may need to receive training if you are hoping to volunteer at an agency such as Mary Washington Hospital.) All volunteer opportunities through COAR require you to have a valid EagleOne ID.

Contact:
COAR
(540) 654-1802
coar@umw.edu

Cheap Seats

Cheap Seats is the film entertainment committee of The University of Mary Washington. It is responsible for showing blockbuster films in Monroe or other locations on campus most weekends for an admission of only $1!

On Campus Movie Consulting

Is your organization interested in showing a movie on campus? Cheap Seats is happy to help guide you through the process. Groups may take advantage of the group's expertise in film and venue selection, publicity distribution, and audience tracking to ensure a quality event.

Contact:
Cheap Seats Cinema
film@umw.edu
http://clubs.umwblogs.org/tag/cheap-seats/

Giant Productions

Giant Productions is our Student Entertainment Association for the University of Mary Washington. It is their responsibility to bring programming to Mary Washington through major concerts, a comedy series, and supporting some of our traditions. When a club contacts Giant for help in booking a band, the club must make sure they have the resources required for holding the event. This includes manpower, funding and at the very least guidance in starting the Event Planning Process with SAE.

Contact:
Giant Productions
giant@umw.edu

University Programming Council (UPC)

UPC hosts a number of events in The Underground. During the fall semester, collegiate and NFL games are projected onto the big screen. Every Wednesday, UPC hosts an acoustic act as well as an Open Mic Night. Bingo has become a tradition on Tuesday nights and Trivia/Game Shows on Thursdays. Every other Saturday, UPC hosts a Karaoke Night and there are the occasional bands on Fridays and Saturdays. Winter Carnival, Be a Kid Night, FallFest and Spring Fling are a few of UPC's signature programs. UPC is always looking for groups to co-sponsor these events with them.

Contact:
UPC
(540) 654-1061
umwupc@gmail.com

Class Council

Class Council is the organization that is in charge of each of our traditions here at Mary Washington. They plan events like Devil Goat Day, Senior Countdown, Rocktoberfest, Halloweens, Junior Ring Week, Spring Formal, Convocation, and Grad Ball. Class Council is made up of the elected officers from each of the four undergraduate classes currently on campus. If your club or organization would like to be a part of one of UMW's annual events, contact Class Council.

Contact:
Class Council
(540) 654-1135
ccouncil@umw.edu

The Student Government Association (SGA)

The Student Government Association (SGA) is the primary voice of the student body. The SGA is comprised of the Executive Cabinet, Student Senate, and Presidential

Standing Committees, as well as six additional campus-wide organizations: Academic Affairs Committee (AAC), Association of Residence Halls (ARH), Commuting Student Association (CSA), Honor Council, Judicial Review Board (JRB), and the Legislative Action Committee (LAC). The SGA Senate and Executive Cabinet are charged with voicing all student concerns and issues. If you have something you want to change on campus, please go to a Senate meeting. The SGA and the organizations within the SGA also help organize and sponsor many events and speakers through the year. They are always available for comments and suggestions.

The Executive Cabinet
The Executive Cabinet is composed of 16 officers, 10 of which are elected campus-wide each spring. The Executive Cabinet members traditionally begin their term in April of each year directly following the SGA Transition ceremony.

The SGA, led by the Executive Cabinet, is a forum where students bring their concerns about campus issues ranging from academics to safety. Executive Cabinet also addresses local, state, and national issues that affect students (for example, VRE parking). They are the students' link with the administration. Along with these duties, they organize community events to foster school spirit, such as Spring Spirit Week aka Beak Week.

The Student Senate
The Student Senate is composed of the Senate President (the SGA Vice-President), Senate Secretary, Senate Parliamentarian, residential and commuting Senators. Both the Secretary and Parliamentarian are appointed during the previous academic year. Elections for Senators are held at the beginning of the fall semester. On-campus Senators are elected through their respective residence halls. The number of students that reside within each building determines the number of Senators elected for each building: each building is granted one Senator for every fifty students. An additional Senator is added when at least thirty students exceed an increment of fifty. Commuting students who wish to become Senators should contact the Senate President for more information.

All students who wish to become a Senator must first attend a mandatory workshop at the beginning of each academic year. Elections are held in the residence halls and, if necessary, in the Campus Center for commuting students. Elections take place approximately one week after the last workshop is held. All vacant positions may be filled by any member of the student body through a petition of fifty signatures which once confirmed by the Senate would establish them as voting members.

The Student Senate gives voice to many student issues and is a valuable resource for student organizations that wish to see changes at UMW. Contact a Senator or the Senate President if you feel there is an issue that needs to be addressed.

Honor Council
The Honor Council is the judicial body overseeing the University of Mary Washington Honor Code, under the direct jurisdiction of the Board of Visitors. The Honor Council President is elected campus-wide each spring, followed by the election of the Honor Council representatives from each class. One Honor Contact is elected within each

residence hall to act as a liaison between students and the Honor Council. The Commuting Student Association elects one commuting Honor Contact as well. Students may apply to become Student Honor Advisors, responsible for representing and advising students and faculty during Honor Council proceedings.

Judicial Review Board (JRB)
The JRB oversees hearings on such conduct as alcohol violations, misuse of University computer and telephone systems, property damage, violations within the residence halls, and violations of motor vehicle regulations. Both the JRB President and Vice-President are elected campus-wide each spring, followed by the election of the JRB representatives from each class. The JRB sponsors a yearly Judicial Awareness Week, which often features a guest speaker and an alcohol-free dance.

The Academic Affairs Council (AAC)
The AAC is the official representative of the student body to the administration on academic issues. The AAC addresses student concerns and lobbies for student needs within the academic departments. The AAC is composed of the Chair, a Cabinet, class representatives and department representatives. Student representatives from the AAC participate in the meetings of Faculty Committees such as Academic Affairs, Curriculum, and Campus Resources.

Each semester the AAC sponsors a Majors and Advising Night, an open information fair where students can learn about a particular major, receive registration information, and voice concerns and ideas. The AAC also organizes the Professors' Honorary Reception to recognize and appreciate professors who have made lasting impacts on students.

The Legislative Action Committee (LAC)
The Legislative Action Committee Chairperson shall call and preside over all meetings of the Legislative Action Committee (LAC) and shall be the focal lobbying representative of the SGA in attempt to bring about student-desired change. The LAC concerns itself with all lobbying efforts for legislative, political, and community concerns that affect the University as a whole. The actions pursued arise directly from the student Senate; therefore on behalf of all the students themselves. The Chairperson shall appoint a Vice Chairperson, a Secretary, a Press Secretary, and Chairpersons of the four standing subcommittees of LAC (National, State, Local, and Campus). Therefore, the LAC represents the student body interests nationally in Washington DC, on the state level to the Virginia General Assembly in Richmond, on the local level to the Fredericksburg City Council, and also to the administration of the University.

The LAC has worked with the city and campus safety offices to ensure the safety of students both on campus, through the addition of lighting in unsafe areas and installation of directional arrows in parking lots, and off campus by correcting surrounding stoplights and improving frequently used crosswalks.

The Association of Residence Halls (ARH)
ARH is a liaison organization that works with and receives funding from Residence Life. It oversees the operations of sixteen residence halls, the UMW Apartment Complex, and Eagle

Landing by working with their respective Hall Councils. Members include a President and Executive Board, elected campus-wide each spring, as well as the President of each Hall Council. The Executive Board of ARH consists of both elected and appointed positions. Hall Councils are elected by the residents of each individual residence hall. All Hall Council members receive assistance through ARH.

Besides acting as a programming, funding, and event resource to the individual Hall Councils, ARH sponsors several campus-wide events throughout the year, including Friday Night Dry, Mr. UMW, and the Powder Puff Football Tournament. ARH works in conjunction with community service organizations on several service projects and fundraising activities especially during the holiday season. ARH also acts as a contact between students, campus groups and the Office of Residence Life and Housing, striving to create a better on-campus community.

The Commuting Student Association (CSA)
CSA's function is to keep commuting students informed of what is happening on campus. Any commuting student may become involved with the CSA. The CSA President is elected campus-wide each spring. Appointments for board positions are made following the election. CSA compiles the Commuting Student Directory each fall, sponsors an Off-Campus Housing Fair, sends out a bi-monthly newsletter, and sponsors a campus-wide BBQs, picnics, and a bagel breakfast throughout the fall and the spring.

Contact:
SGA (LAC, AAC, CSA, Senate) (540) 654-1150
sga@umw.edu
http://studentgov.umwblogs.org/

Honor Council (540) 654-1144
Judicial Review Board (540) 654-1142

University Committees

Mary Washington has many committees that are formed to discuss and make suggestions on how the university may be more effective. These include the Issues Advisory Council and Interview Committees. New committees are formed by the campus administration to meet the needs of current issues.

If you or anyone in your organization is interested in taking part in these committees, contact the SGA Office at 540-654-1150. Interested students will be asked to complete an interest sheet. When a committee requests a new student member, the most appropriate applicant for that specific committee's purpose will be recommended. The SGA will conduct a drive at the beginning of each year to gather interest sheets so that a diverse array of students will have a chance to contribute their thoughts. Completing an interest sheet, however, does not guarantee that you will be placed on a committee. The goal is to match up students with committees that interest them and to which they can make a significant contribution.

Publicity

You've planned your event, reserved space and have applied for funding – it's time to let everyone else know about it! There are many different ways to advertise your campus events, and we encourage clubs and organizations to come up with new and creative publicity ideas. If you have any questions regarding a new publicity idea, please contact SAE at 540-654-1061.

What to Include in Publicity

Each piece of publicity should be professional in design and easy for people to read to get the pertinent facts. Your posters should not appear "cluttered" with words and/or graphics. If so, your message may become lost visually. The following items should be included in every promotional piece you create:

1. Who/what are you trying to promote? If applicable, include the name of performer(s) and what is special about them.

2. What type of event is this?: Is it a concert, dance, fundraiser, tournament, etc. For instance, what is the topic or type of music? Don't assume everyone who reads your publicity will understand "catchy" titles.

3. When is the performance? Include day, date, starting time, time doors open, and if applicable, the date tickets go on sale and where.

4. Where is the event? Include the building and room name or number, and rain location if applicable.

5. Why should someone attend? What is so special about your event? Remember – you need to sell it!

6. How much will admission be?

7. Sponsor's name (as well as all co-sponsors).

8. For distribution on campus, you must include a point of contact: The first name and phone number or e-mail of a person responsible for the event in case of questions.

Timing

Publicity should be released far enough in advance to allow people to include attending the event into their social plans. Normally, this means that posters need to be up at least 7 to 10 days before your event. However, unless the date for beginning tickets sales is included in your promotion, materials should not go out before you are ready to start selling tickets.

Distributing Paper Publicity

There are several important guidelines that every organization must follow to help maintain a clean campus and to give equal access to available publicity space.

First, and most importantly, ANY poster, sign, flyer, notice, banner, or other advertisement to be displayed on campus MUST FIRST be reviewed, approved, and stamped by SAE. All materials must include a phone number (local preferred), and the first name of the contact person.

Be sure to bring your original signs and publicity materials to SAE to be approved BEFORE making multiple copies and posting them on campus.

For an event, printed publicity material must have the event's sponsoring organization(s), the date of the event, a contact name, and a contact phone number.

Do not include any obscene or illegal information on the material. SAE will not approve vulgar material or anything with pictures or statements concerning alcohol or drugs. Materials will only be approved if they are keeping within the values of the University.

Per the University of Mary Washington Posting Policy, publicity materials may ONLY be displayed on public bulletin boards inside campus buildings; outdoor bulletin boards outside of Lee, Jepson, and Seacobeck Halls; or on tables in Seacobeck, Eagle's Nest, and The Underground. The following guidelines apply regarding where and how material may be displayed:

At no time may anything be posted on lampposts; trees; columns; the Woodard Campus Center arcade; walls, front doors, or windows of buildings. Do not use chalk on the sides of buildings or the Woodard Campus Center arcade. Groups will be assessed a cleaning charge if they do. REMEMBER TO POST ON BULLETIN BOARDS ONLY!
Items may be attached to bulletin boards only with appropriate materials such as thumbtacks, push pins, standard staples, and masking or cellophane tape. Use of heavy-duty staples or staple guns is prohibited.

Fliers for Seacobeck, Eagle's Nest, and/or The Underground tables must be half-page size (8.5" x 5.5"), and will be removed every Friday morning in the Nest and Seacobeck, and every Monday in The Underground. Only campus organizations may post publicity materials on Seacobeck tables.

Residence halls: All items to be posted in the residence halls must be brought to the Office of Residence Life in Marye House. The Residence Life staff will post your materials – be sure to submit these in plenty of time (at least one week ahead of the event) so they are displayed in time! Any materials not posted on an approved bulletin board in the residence halls will be removed. Do not enter a residence hall with the purpose of posting materials yourself. When bringing copies to Residence Life, call first to see how many they need.

1. Please remove fliers from around campus as promptly as possible following your event.

2. Failure to follow any of the above-listed posting regulations may result in a warning; a second offense may result in the loss of the privilege of posting materials for the remainder of the school year.

Other Notes Regarding Publicity Distribution

Do not assume that the people who are distributing your posters are doing a good job. Ask your Publicity Chair to do the following:
1. Go to SAE and have the materials stamped before duplicating them and posting them around campus.
2. Compile a list of locations where you want your posters to be.
3. Manage the distribution by ordering adequate quantities and setting some aside to be used in a second wave.
4. Conduct a follow-up check of poster locations to see if replacements are needed.
5. Sometimes they fall down or are removed by others - some even become collector's items.
6. Abide by the Posting Policy. It's frustrating to waste energy putting up posters where they will be removed.

Reserving Standards

"Standards" are wooden, T-frame structures that many organizations use to hang publicity around campus on the day of an event. To reserve standards for your organization, you must:

1. Complete a Facilities Services Work Order and send the completed work order to Facilities Services two to four weeks before the date the standards are needed.
2. The work order must include the date, time, and location of the event, as well as a contact name and telephone number.
3. The Facilities Services Set-up Department will deliver the standards to the location you request the date listed on your work order. Your organization may then distribute the standards across campus.
4. All publicity materials posted on the standards must follow the guidelines for posting on the UMW campus.
5. The standards must also be cleared of all publicity materials and returned to the location of delivery within 24 hours of the event.

Contact:
Facilities Services Work Order Management Desk
(540) 654-2078

Copy Center

The UMW Copy Center is located in the basement level of Seacobeck Hall below the Washington Diner. Services include copies, fax service (incoming/outgoing), transparencies, specialty paper, poster-size printing, and GBC (plastic spiral) binding. All

copy orders must be submitted through a work order, available at SAE, in the Copy Center or online (http://adminfinance.umw.edu/copies/).

Information for Clubs Submitting the Work Order:
1. You may complete the Work Order online. Please select the appropriate work order based on your form of payment. Be sure to include your organization FOAPAL string. Print this form and bring it to the SAE office for approval along with the original or a copy of the document you plan to print.
2. During the regular academic year, turn around for a copy job is approximately 24 hours. If you need a job done more quickly, submit your work order in person to the Copy Center.
3. Completed copy jobs charged to a student organization which is why it is verification from SAE is required showing that you have approved funds available in your account. Jobs are available for pickup in the lobby area of the Copy Center. Retail jobs are released upon receipt of the payment. Students may pay with cash, check, or EagleOne for personal copies at the Copy Center, just select "Retail Work Order" in the Forms folder. A hard copy of this form is also available at the Copy Center.

Distributing Electronic Publicity

SAE has electronic media in place that you might find useful. The first is The Weekly News, a newsletter which is sent via a link to all undergraduate students. To have your event or announcement listed, simply fill out the submission on the SAE Weekly News website. The newsletter link is sent out every Monday. **The deadline to have your announcement or event is noon on the Friday before distribution.** Requests received over the weekend will not be honored. Because of the effect on the university's server, newsletters are only sent out on Mondays unless there is an emergency. From time to time, The Bullet prints a calendar section listing events that are scheduled.

In addition, SAE can help with advertisements on the flat screens located in the across the campus. Our staff works with University Relations to develop announcements and advertisements. These ads may include photographs as well as video. To assist clubs and organizations, two templates are available for download on the Forms page of the SAE website. One template is used to advertise meetings, and the other for events. Simply complete the template and send it to SAE. We will forward to University Relations and ask them to put these on the screens.

Finally, SAE maintains a Google Calendar of events on the SAE website. To have your event listed, simply check the box on your meeting or event request form.

Other Publicity Distribution Methods

While flier and electronic distribution remains the most popular means of advertising meetings and events, there are many other ways to reach the University Community, such as those listed below.

Creative Promotion and Enthusiasm
- Set up your own social media accounts like Facebook and invite students to be "in the know" about the great programs you are planning!
- Be Creative! Use teasers (short performances), film, video clips or recorded music at the start of other events.
- People walking around campus in costume or with sandwich boards distributing fliers are another great way to get your message out!
- Give away t-shirts, buttons or other imprinted items as a way to get the word to students!
- Create a buzz word or phrase that will catch the interest of others. Print flyers with just the buzz word and post these around campus. This will arouse the curiosity of the reader. Remember – people like to be in the know and will try to guess or find out what's happening.
- Finally, be enthusiastic about the program! You must convey that enthusiasm to others through your promotion so that they become enthusiastic about attending. Make sure you talk up the program to all your friends, acquaintances, classmates and faculty members!

Reserving a Tables
Many student organizations utilize tables to pass out information about events, sell tickets, or hold elections. It is always a good idea to reserve your table advance.
To reserve a table, see the student aide in SAE. Reservations are made on a first-come first-served basis and must be made in person.

Please follow these guidelines when using the tables:
1. NO outside solicitation is allowed (credit cards, sale of food items from outside vendors, etc.). Petitions and sales of admission to concerts, dances, etc. are allowed.
2. Please use appropriate behavior while using the tables.
3. Do not harass students or visitors to the campus. You are allowed to play music, make announcements to passersby, and get up from your table, but we ask that you do not station your staff at the entrances to buildings.
4. Please be respectful of other organizations using tables. If signs or paraphernalia are left on the table by other groups during your reserved time slot, please bring them to the SAE office. As a courtesy, DO NOT throw them away. Also make sure to clean up any mess that you make at the tables.

The Bullet
Any organization may purchase an ad in The Bullet, the University's weekly student administered newspaper. For publication dates and detailed information, contact The Bullet via phone or email.

Contact:
The Bullet
(540) 654-1153
umwbullet@gmail.com

The Spirit Rock

The Spirit Rock, located outside of Willard Hall, is a popular means to both express individual and/or group feelings and to publicize on-campus events.

There is no cost to paint the rock; however you do have to follow these simple guidelines:

- There is NO reservation process for the rock – it is a first come/first served basis.
- The staff in SAE do not monitor or control use of the rock. This is a function of SGA.
- Be considerate when painting the rock. If another organization has just painted it, please do not remove and/or vandalize another group's design for at least 24 hours.
- Do not paint any vulgar or obscene messages on the rock. Please be aware that not only the campus community will see what is posted, but also visitors, VIPs, and prospective students.
- You may use any type of standard indoor/outdoor paint to paint the rock, and you may use any tools to paint with (rollers, paintbrushes, hands, etc). However, spray paint is NOT allowed on the spirit rock as it is harmful to the area around the rock.
- **Paint and painting equipment is available for check out to ICA registered clubs only, in the ICA office in SAE**.

Have fun while painting the rock and make it colorful and creative!

UMW Post Office

The UMW Post Office, located on the first floor of Woodard, offers many U.S.P.S. mail services, including priority, certified, insured, registered, international, and overnight mail; the shipment of packages up to 70 pounds through US Mail and UPS; and sale of envelopes, stamps, and Tickleopes. Window service at the UMW Post Office is available Monday through Friday, 10 a.m. to 4 p.m., but mail may be dropped in the on campus or out-going mail slot at any time. Also, for your convenience, there are two additional mailboxes for stamped mail. One is on Campus Walk in front of George Washington Hall, and the other is at The Apartments at UMW on William Street.

Students may access their mailboxes and combinations through Banner, under "personal information." Mailroom personnel can retrieve and provide you with your information, but a fee will be assessed after the second time they must do so.

For special services including return receipts, delivery confirmation, and insured mail, please contacts the UMW Post Office.

For on-campus mailings:

Many organizations plan all-student mailings to publicize events. Because most of this paper ends up on the floor or in the trash, this is not the best way to advertise your event and is very costly when you consider the printing charges.

If you still want to do so, mailings to publicize events can be distributed to students and/or faculty/staff through the UMW Post Office. To do this, you must have the brochures stamped in SAE, and you must complete and submit to the UMW Post Office a "Distribution Request Form" at the time of mailing. These forms are available on the UMW Post Office

website umw.edu/post. Please include organization name, phone number, and contact person. There is no charge for on-campus mailings.

For off-campus mailings:
To send mail using your student organization account, you must complete a "Mail Summary Report." Get this form through the UMW Post Office. Please submit the mail summary report with your mailing. Drop your mailing in either the "outgoing mailbox" in SAE or deliver directly to the UMW Post Office. Outbound mail is collected at 3:30 p.m. each day and delivered to the U.S. Post Office. Mail deposited after 3:30 p.m. will be taken to the U.S. Post Office the following evening, except on Fridays, when it will be delivered to the U.S. Post Office Monday evening.

Packages may be taken directly to the UMW Post Office, or they may be left in SAE to be picked up by UMW Mail Services. If you choose to have your package(s) picked up in SAE, it must be placed with the regular outgoing mail to be picked up during the regularly scheduled mail run. The package should have a completed Mail Summary Report attached. There is a 70 lb. weight limit on outgoing mail packages.
The UMW Post Office suggests student organizations use the following format for efficient delivery:

> Organization Name
> Attn: (if applicable)
> Student Activities
> 1301 College Avenue
> Fredericksburg, VA 22401

The suggested format above will also help in receiving packages from UPS or FedEx, since they deliver directly to the departments. Thank you.

Contact:
Post Office
(540) 654-1049

Publicity Resources

Design Services
Design Services is a complete professional design studio within the University and terrific resource for organizations that need help designing brochures or more elaborate publicity. Their creations range from the simplest one-color form to complex multi-color pieces. Programs, posters, brochures, business cards, invitations, newsletters, logos – you name it, they can do it! Whether you have a complete concept for your next project or just the spark of a great idea, contact them for a creative consultation.

Design Services can also help answer questions about using official university symbols such as the University Logo, Eagle, and Seal, as well as provide your recognized student organization with stationery.

Any publication that will be distributed off campus needs to go through The Office of University Publications, the parent office of Design Services and Editorial Services. Editorial Services must copy edit all publications that will be distributed off-campus, and Design Services must either design or approve the design. Contact the Office of University Publications at (540) 654-1055, or fax to (540) 654-1071.

Information about proper use of University graphics may be found in the University Style Guide at http://advancement.umw.edu/universityrelations/design-services/publications-guidelines/. Please contact Design Services to schedule a creative consultation with the graphic designer!

Contact:
Design Services
(540) 654-1932

Use of the University of Mary Washington Eagle

The University of Mary Washington Eagle is the official mascot of the school. While it is permissible to use the Eagle for your documents, it must be the official University Eagle, without exception. A high resolution digital file of the official Eagle is available from Design Services.

Any organization wishing to use the University Eagle must take a final draft to Design Services. Please allow at least one week for Design Services for review, revisions and/or approval of your document.

Use of the University of Mary Washington Name, Logo, and Seal

Organizations wishing to create documents using the UMW name, logo, and seal for use off campus must follow the guidelines outlined in the Graphic Standards Manual (http://advancement.umw.edu/universityrelations/design-services/publications-guidelines/). These guidelines require that the Primary Logo (University of Mary Washington text accompanied by the column design) be used. A high resolution digital file of the logo is available from Design Services.

Any organization wishing to use the UMW name for publications that will be distributed off campus must take a final draft to Design Services and allow at least one week for Design Services for review, revision, and/or approval of your document.

The official University Seal is used in selected applications as determined exclusively by the President or a designated representative. Any organization wishing to use the Seal must submit its request for approval in writing to the Office of the President.

Letterhead and Stationery

Recognized student organizations may request UMW letterhead and stationery with the organization's name and contact information. Official UMW letterhead and stationery may not be copied in bulk by the Copy Center – it must be ordered through Design Services to be printed in Richmond by Virginia Correctional Enterprises. Follow these steps to receive your own letterhead:

1. Before you place an order, there must be enough funds in your budget to cover costs, and the expenditure must be approved by the Finance Committee.

2. Fill out a Design Services Work Request, available for download at http://advancement.umw.edu/universityrelations/design-services/place-an-order/ under the heading "Place an Order," or hand delivered to the Design Center. (Note: You will need to include your organization's account number.) Requests should be submitted to Design Services (you will need your account number). If you have one, attach a current sample. A minimum order applies, though it is most cost-efficient to order in larger quantities.

3. Allow three weeks for delivery. Shipments will be delivered to SAE.

Publicity Tips

21 different ways to Get *YOUR* Message Out Not Using a Flyer

1. SAE weekly email.
2. Chalk on the sidewalk (no walls or buildings, no spray-chalk). Keep in mind you may be asked to wash the chalk off of the brick so have a plan for this.
3. Helium Balloons with the program advertisement written on it or attached to the string.
4. Paper footprints leading to the event from campus walk.
5. Door hangers on the resident's door knobs (with Res Life approval.)
6. Clothes pins – write your message on the clothes pin and attach them onto back packs as students pass by.
7. Advertise on WMWC (the campus radio station).
8. Place the advertisements on gum, pencils, fruit, or some other kind of item.
9. Flat panel info screens.
10. Sandwich boards on campus walk.
11. Table tents.
12. Buttons.
13. Banners.

14. Speak at other club's meetings.
15. T-shirts with info about the event bought in advance and worn by volunteers.
16. Facebook events.
17. Paint the spirit rock.
18. Announcements before the start of other events.
19. Classroom dry-erase boards.
20. Dress up in costumes.
21. **Word of Mouth**. Get your members excited about the program and have them spread the word!!!!!

Finance Committee Policies

Your club is up and running and you're recognized and registered. Now what? Before getting to know the resources available to help your organization develop and to plan events, think about how your organization is going to pay for those things. Note: Your club may fall under the general rule and receive funding solely from finance committee, or you might have to follow an alternate path to receive funding. For example, if yours is a sports club that competes, your sole source for funding is Campus Recreation.

Finance Committee FAQ

Who may apply for Finance Committee funds?
To receive state funding allotted by the UMW Finance Committee, the ICA or SGA, and SAE must first approve the organization. Under no circumstances will funds from this source be used to support events or programs that constitute lobbying or electioneering..

What is the role of Finance Committee?
The Finance Committee's role is to allocate and distribute funds to eligible clubs as efficiently and equitably as possible. There are more than 100 clubs and organizations eligible for funding.

What should I do if I need help with my club or organization's finances?
Any Finance Committee member is able to take questions that relate to the Finance Committee.

When do Finance Committee meetings take place?
The Finance Committee meets on Sunday evenings in the SAE conference room while the University is in session, unless otherwise specified. A complete schedule of meetings will be posted is SAE. Meetings start promptly at 6:30 pm and clubs must sign up to meet with the committee no later than 4 pm on the Thursday before the meeting they plan to attend.

When do funds become available?
The Finance Committee will complete the Initial Budget by the end of May. Funds are not available for use until the beginning of the fall academic semester. **The last day to use funds from this account is April 30.**

Finance Committee Training
Finance Committee training for all Treasurers will be held within the first two weeks of the beginning of the academic year; the date and time will be announced via email. At least two representatives from each club or organization must be present at one of the training dates and one must be the Treasurer. These representatives will be held accountable to share the information presented to their organization.

At training, budgets for the academic year will be presented, and changes to Finance Committee policies and all other relevant business and finance policies will be discussed. A representative from Accounts Payable may also be available to answer your questions regarding forms or other elements of the process for spending funds. Organization treasurers and/or other members with signing privileges are required to attend Finance Committee training during the fall semester. Treasurers are to keep current, complete, and accurate records of all organization funding to include copies of all receipts and transactions; at any time the Finance Committee can perform random audits. **No funds will be transferred to organizational accounts if your group is not represented at the training session. Attendance is taken and those individuals that leave early will have their name removed from the list of attendees. Groups failing to have 2 representatives attend one of these sessions will have any funds allocated returned to the Finance Committee's budget.**

If your organization's Treasurer and at least one other member are not at one of these training programs, your group will not be allowed to use any funds in the club's account until the training is complete. Funds already allocated by the Finance Committee will be returned to the Finance Committee and your group will need to re-apply for these. Due to the multiple groups involved, make up training programs are at the discretion of the Finance Committee.

Initial Budget Hearings

Budget hearings for each academic year are held the preceding spring. At that time, each organization must present a budget request form. Organizations may request additional monies throughout the year. Additional budget requests should be on a Funding Request Form and submitted to the Finance Committee Office by 4 p.m. at least 3 days before the hearing. The Finance Committee may, at its discretion, request electronic submissions of budgets and funding requests.

Groups may also submit their initial budget at the start of the fall semester without penalty. The Finance Committee will begin to hear these requests at their regular meetings during the month of September. Initial budgets received from existing clubs after the last Sunday in September (for 2013, the date is September 29) will be considered late budget requests and will be penalized with an initial 10 percent cut and are subject to the same scrutiny applied during spring hearings.

If you have a program that has occurred annually and has become an expectation of the student body, you may choose to request funds during the Initial Budget Hearings. Keep in mind that if it is funded but not at the level you desire, you cannot return to the Finance Committee for additional financial support. Unless space has been secured and a contract negotiated (but not signed), funds for programs will not be allocated. Members of the SAE staff are present at all meetings of the Finance Committee and may provide verification regarding to these expenses in instances when written verification is not available.

All eligible student organizations, regardless of the size of their membership, are eligible to request funding for their programs. Groups with small numbers of student members which request large allocations intended for the primary benefit of the group membership may not receive the total amount requested as this may not benefit the greatest number of students.

Decisions on the allocation of funds involve an element of judgment on the part of the members of the Finance Committee. That is why it is imperative for you to appear before the Finance Committee to present your request in person as well as submit 11 copies 3 days in advance of the meeting you have signed up to attend. The Finance Committee will not consider your request if you do not attend this meeting and you will need to re-apply by resubmitting the 11 copies. The Committee members are committed to making such judgments primarily on the basis of the following criteria:

1. How does this event recognize the diverse needs of the student body?
2. How does it meet our goal to spread the benefit of the funds to the largest number of students?
3. Is the organization capable of doing what is requested as demonstrated by a history of successfully conducting similar events? If not, has the group demonstrated their ability to meet this challenge?
4. What is the overall benefit of the event to the student body (will it benefit a large number or just a few – remember, the key word here is students not the general public since the money being allocated is actually from student fees)?
5. To render funding decisions in a fair and objective manner.

Any requests not submitted on the proper form will not be considered.

Contact:
Finance Committee
umwfinance@gmail.com
finance.umwblogs.org

Sports Club Funding

Sports clubs must follow the specific set of guidelines established by Campus Recreation to receive funding. Sports Clubs are any recognized student organization that engages in the following activity:

1. Competition with other colleges or recognized groups.
2. Travel to other cities or campuses and/or travel by groups to the University of Mary Washington for the purpose of competition.
3. Use of University athletic facilities or athletic facilities in the Fredericksburg area.
4. Use of the University of Mary Washington name and logo.

Advising and Support for Sports Club Activities
The Office of Campus Recreation provides support and advice concerning sporting activities, such as practices and competitions. The Campus Recreation staff will also facilitate deposits and expenditures of money while ensuring that organizations are following appropriate financial procedures.

Contact:
Mark Mermelstein
Campus Recreation
540-654-1187

Student Organization Accounts

Obtaining a Student Organization Account
In order to have a UMW student organization account, a group must need meet the following requirements:

1. Be recognized by the ICA, SGA, or another University office.
2. Be registered with SAE.

To obtain an account, simply go to the SAE office and see the Office Manager. She will forward your request to Business Services on your behalf. All student organization accounts numbers have six digits and begin with "306."

Using Your Student Organization Account
In order to fully understand how to use a student organization account, two representatives (one must be the Treasurer) of the club or organization must attend the Financial Training, which is held within the first two weeks of the academic year. During the training, staff from the Accounts Payable and Purchasing Department may be present to discuss in greater detail the information listed here. Only those students who are listed on the Student Organization Registration form may charge expenses to a club account. Make sure you keep your form current!

Who May Use Your Account
Once you receive notice of your account, you must complete a signature card, which is located on the back of the Student Organization Registration Form. You must list at least three officers of your organization as signers on the account in order to spend money; two individuals must sign all expenditure requests and it is the responsibility of the club's leadership to obtain these signatures. Submit completed forms to SAE. Changes and/or updates to an organization's form may be made at any time during the year. Groups cannot expend any funds from their account until this form has been submitted to SAE.

Purchase Requisitions and Check Requests

If you wish to have a check issued from your account, you will need to fill out a Purchase Requisition/Check Request form. These pink forms are available in SAE. If you are ordering a product, follow these directions:

1. Call vendors in advance to determine which has the lowest price. After choosing a company, let them know you plan to use a purchase order and discuss final arrangements, such as shipping dates.

2. Complete the requisition request **before** you do anything else.

3. See the staff in SAE to place the order and enter the order into eVA.

4. Checks will be mailed directly to the vendor. Companies may send invoices directly to SAE for processing. To avoid delay, please make sure that purchase requisition forms are filled out completely and signed by two of the organization's authorized signers.

5. If two organizations are dividing an order, each organization must complete its own requisition signed by authorized members. The organizations should submit the two requisitions at the same time.

6. Two authorized signers from your organization as well as an SAE staff member must sign every Purchase Requisition/Check Request. Funds cannot be accessed from your account without all three of these signatures. Once you have completed a purchase requisition, submit it to SAE to get the final SAE staff signature.

7. Once the requisition is signed, SAE will send the purchase requisition along with necessary invoices and/or receipts to Accounts Payable for processing.

8. Due to the Prompt Pay Act, payments will not be made from your account until 30 DAYS after you receive the goods and/or services or the invoice, whichever comes later. Be sure that the companies you are working with are aware of this. If you have questions about this policy, contact Accounts Payable, at 540-654-1224.

9. **Important:** If you are ordering from a company, keep in mind that the pink form is internal to the University. This form has no use outside of the University and should not be given or faxed to anyone.

Reimbursements
Due to recent changes developed by the Department of Accounts in Richmond, the University has had to change its reimbursement policy. Currently, we are limited to approving reimbursements up to $100. Any reimbursement above this amount requires additional approvals, which may increase the processing time.

SAE does not encourage students to use their own money to cover costs of organization expenditures. Please plan ahead so that you may take advantage of signing out a student credit card or completing a purchase requisition for payment. If a member of an organization needs to be reimbursed by SAE, please follow the guidelines for completing a Check Request:

Check Request Process
1. The "Vendor Name and Address" section of the request refers to the person or business that will receive the check.

2. Complete and sign the bottom right "Receiving" portion of the purchase requisition.

3. Attach the **original itemized purchase receipt**. Highlight those purchases that you wish to have reimbursed and list each on the form. SAE will not accept copies of receipts. Be sure, however, to make a copy for your own records.

4. Two authorized signers from your organization and an SAE staff member must sign every Purchase Requisition/Check Request. Funds cannot be accessed from your account without all necessary signatures. Note: The person who is being reimbursed may not be one of the signers.

5. Once the purchase requisition is signed, SAE will send it and the appropriate forms to Accounts Payable.

Depositing Funds

For the 2013-14 academic year, the University will establish agency accounts for all clubs. Funds deposited into these accounts will roll over from year to year. The 6 digit organization number will be the same as the number in the 1556 series for withdrawals. However, unlike the 1556 series, if there is a balance at the end of the fiscal year in the agency account, it will remain with the club. Be sure to use the correct code when depositing your revenue.

Upon completion of your program or event, all funds must be deposited into your club account. Under no circumstances are you to take any money back to your room or leave it in your office overnight. Arrangements have been made to store locked cash boxes with Campus Police should overnight storage be required.

If you are selling tickets daily, you must deposit this money daily into your club account. A Cash Transmittal form, available online, must accompany cash or check deposits made by your organization. Please follow these guidelines to ensure a successful transaction:

1. When completing the club cash transmittal form, make sure the correct "org" number is listed in the "org" column. Determine the appropriate revenue type and enter that in the "account" column.

2. Some common revenue codes for student organizations are:
     i. Dues: 56403
     ii. Fund-raising: 56404
     iii. Miscellaneous: 56406

3. All checks must be stamped using the "deposit to" stamp in the SAE office. Be sure to stop by our office and stamp any checks you might have before going over to the Cashier's Office.

4. Take the deposit and the form to the Cashier's window in Lee Hall. Deposits must be made between 8 a.m. and 5 p.m. The Cashier's office will send a printed receipt of your deposit to your UMW mailbox or issue one to you at the time of deposit.

Transferring Funds

The transfer of funds from one account to another will be handled by SAE. SAE will send a request to the Budget Office to make the change.

In the case of co-sponsorship, please refer to the Purchase Requisition/Check Request section as outlined above. There is no need to transfer funds from one club account to another.

Account Statements

It is necessary that your organization's treasurer keep detailed records of the money deposited and/or spent. SAE can provide expenditure and balance information from the University accounting system, however all items may not be posted to the account when the information is pulled. This is why it is necessary for club treasurers to keep accurate records.

Contacts:
SAE (540) 654-1061
Purchasing Dept. (540) 654-1127
Accounts Payable Dept. (540) 654-1030

Bookstore Accounts

Any student organization with an on-campus student organization account may charge items directly to their account without having to have a member use their own money and be reimbursed. This is great for buying honorarium gifts or supplies needed quickly.

Information on establishing an organization's account:

1. Notify SAE so that we can alert the Bookstore Manager that the charge is approved.

2. Go to the Bookstore Office with your full FOAP (this is available in SAE) to purchase your items.

3. Bookstore personnel will complete the paperwork to charge your club account for the items purchased.

Remember that your organization is responsible for payment of these charges. If you do not have the funds in your account to cover the expense, the amount of the expense will be placed on the student account of the person signing the receipt.

Contact:
Bookstore Accountant
(540) 654-1017

Purchase of Computer or AV Equipment

Simply put, if it is related to computer or audio-visual equipment, it must be purchased by IT unless your group is using the revenue on deposit in your agency account.

Contact:
IT Help Desk
540-654-2255

Using the SAE Credit Card

To avoid the reimbursement process on large purchases and organization-related trips, SAE has 3 credit cards available for student organizations. To be eligible for the card, an organization must have a valid on-campus student organization account through the University, a completed Student Organization Registration Form, and the organization account must have the funds on record to cover the charge before the card will be issued. All SAE credit cards are VISA, so be sure that is accepted at the place of purchase. To use the SAE credit card, please:

1. Be sure that your organization has the funds available in its account to cover the expense. If using funds that have been allocated by the Finance Committee, remember that you can only use that money to cover purchases that were approved by the Finance Committee. If you purchase something that has not been approved, you can be held personally liable to reimburse your organization's account. Groups do not have the authority to reallocate funds that have been deposited into their account for other purposes. Reallocations of funds set aside for an expense within your approved program budget require the approval of the Finance Committee and may only be reallocated for use within the program budget to which they were assigned.

2. Complete the Student Organization University Credit Card Approval form. Be as specific as possible when filling out this form – only the items listed may be purchased. You cannot use the card to pick up other items that you forgot to list. Two authorized signers on your student organization account must sign the form in order to authorize the expense. Purchases made that were not listed on this form may be charged to the student account of the individual making the purchase.

3. If you are purchasing any kind of food, be sure to also complete the Business Meal Form. The person using the card should sign the Business Meal form along with the Director of Student Activities and Engagement. Remember that your expense cannot exceed the maximum per person per diem amount as determined by the Commonwealth of Virginia. Most food purchases must be made through Dining Services. Think of it this way – if you can eat or drink it, you have to fill out a Business Meal Form.

4. A Request for Travel form is also required by Business Services and must be completed before you make your hotel reservation. Make sure you stay within the maximum amount allowed as determined by the Commonwealth of Virginia when booking your hotel (this is part of the Request for Travel form). This is a "per room per night" allowance and does not take the number of people in the room into consideration.

5. If you are buying gift cards, gift certificates or any item you are planning to give away in any fashion, you must complete a Gift Log. The policy as developed by Business Services states that failure to complete the log will result in the person making the purchase being held personally responsible for the expense.

6. Submit these forms to SAE at least five business days before your organization needs to have the card. There are only three cards and these are reserved on a first-come-first-served basis, so please plan ahead.

7. Be sure to pick up the card at the time designated from the Cashier's window in Lee Hall. You will be asked to sign a Purchasing Agreement Contract before the card will be released to you.

   a. Always carry your UMW ID when making a purchase to prove your affiliation with UMW.

   b. If going to BJ's, be sure to stop by the SAE office and ask for the BJ's card.

   c. If going to Wal-Mart, be sure to request the Wal-Mart card (this will save you time at the register as you tell them the purchase is tax exempt).

   d. Only the person who checked out the card may make purchases with the card.

8. Your organization will be responsible for all charges made to the card while the card is signed out in your name. Do not use PayPal or save the credit card number on a computer site or on a computer. Do not use the card for any online purchases as it is designated for over the counter use only.

9. Organizations always want to order items from a business. Remember the rule of thumb – you can't! All orders must be made via eVA. If you order something without authorization, you run the risk of being held personally responsible for the expense and may need to settle this account with the business on your own.

10. Once your purchase is made, you must promptly return the card and itemized receipts of purchases made with the card.

   a. It is essential that you include ITEMIZED RECEIPTS when returning the card. Failure to provide appropriate receipts upon return of the credit card or to return the credit card will result in a freeze of the organization account funds. No additional purchases will be made until the missing items are received in SAE.
   b. The individual who signs out the credit card for an organization assumes ultimate responsibility for the credit card and all purchases made.

Failure to abide by these policies can result in suspension of Credit Card privileges.

Contact:
SAE
540-654-1061

Corporate/Business Sponsorship

Some groups choose to solicit corporate or business sponsorship for their event, especially those that occur annually. Because UMW is a public institution, there are many guidelines that clubs must follow. If a group plans to ask companies for support, it must submit a request (including the amount to be requested and the names of the companies) to the Director of Student Activities and Engagement for review before any company is approached. No tobacco, alcohol, or credit card sponsorships will be allowed.

Cashboxes

You will need to use a secure cashbox if your organization will be receiving money of any kind (cash or checks). All cashboxes must be able to be locked by means of a key or combination lock. Cashboxes should be in the care of a responsible member of the group at all times and should not be left unattended. **Cashboxes containing cash are not to be stored in a residence hall room, office, or off campus overnight.** Groups may either deposit the money collected in a particular day with the Cashier's Office, or store the cashbox with the Campus Police overnight. When dropping off a cash box for overnight storage, make sure you have 2 copies of the Cash Box Receipt form. These must be signed

by the person dropping off the box and person receiving the box. One copy will be given to the student; the other remains with the Officer.

Need to borrow a cash box? SAE has several available for checkout. See a member of the SAE staff for assistance. If your organization has a constant need for a cashbox, it can be stored with the Campus Police and checked out by a member of the organization who is pre-approved to do so. A list of pre-approved members must be submitted to the Campus Police by the head of the organization when a cashbox is presented for storage and the name of the group must be on the box. The person checking out the cashbox must present a valid University ID to the Police Department.

THE UNIVERSITY OF MARY WASHINGTON FINANCE COMMITTEE CONSTITUTION

Article 1: Introduction
Section I: Purpose
The University of Mary Washington Finance Committee strives to uphold the Statement of Community Values as set forth here.

The University of Mary Washington is an academic community dedicated to the highest standards of scholarship, personal integrity, responsible conduct, and respect for the individual. We hold among our foremost common values:

- The importance of personal integrity as reflected in adherence to the Honor Code.
- The right of every individual to be treated with dignity and respect at all times.
- The acceptance of and respect for diversity in our community as articulated in the Statement of Inclusion
- The freedom of intellectual inquiry in the pursuit of truth.

As members of the University community, we refuse to tolerate behavior that in any way compromises or threatens these values.

In doing so, the University of Mary Washington Finance Committee allocates a portion of the budgeted Comprehensive Fee through the Business and Finance Office and allocates these funds to various recognized student organizations that meet the following criteria:

1. Must be recognized by either the University of Mary Washington Student Government Association or Inter-Club Association.

2. Must not be politically motivated or organized for the purpose of making a profit.

3. Must exemplify the values articulated in the Statement of Community Values stated above.

4. Must assist the organization in furthering its mission and/or purpose. All allocated funds must be spent on items or services approved by the Finance Committee. Allotted money may NOT be spent on the following items:

   a. Personal articles that are damaged, lost, or stolen.
   b. Clothing not related to club activities.
   c. Any or all expenses related to personal negligence, including, but not limited to traffic fines.
   d. Alcoholic beverages.
   e. Tobacco.
   f. Donations.
   g. Gifts.

Article II: Organization
Section I: Committee Composition
The Committee shall consist of nine (9) members including three (3) Executive Board members who shall serve for one full calendar year. Members shall assume office on the second meeting after Spring Budget Hearings.

Section II: Qualification
Candidates for election to the Committee must have a cumulative grade point average of at least 2.2, and must achieve at least a 2.0 grade point average each semester while in office. Candidates and members must be full-time students and must be enrolled at University of Mary Washington for the full term.

Section III: Executive Board
The Committee's Executive Board shall consist of three (3) officers (Chairperson, Vice-Chairperson, and Treasurer) who shall be elected by incoming Committee members during the second meeting after Spring Budget Hearings end. Candidates for Executive Board must be nominated by an incoming member of the committee. The officers of the Committee's Executive Board shall be as follows:

1. **Chairperson**.
   Duties of the Chairperson include: presiding over all Committee meetings, voting only in the case of a tie, operating the Committee's day-to-day activities, acting as a liaison between the Committee and the Business and Finance Office as well as the Committee's advisors, and overseeing the Committee's budget.

2. **Vice Chairperson**.
   Duties of the Vice-Chairperson include: acting as a support for the Chairperson, recording minutes for all Committee meetings, notifying members of Committee meetings, conducting all Committee-related elections, and in the event that the Chairperson is unable to perform their duties, the Vice Chairperson shall perform the duties of the Chairperson.

3. **Treasurer**.

Duties of the Treasurer include: keeping records of budgets, requests, and transactions throughout the year and informing the appropriate advisors of pending transactions. In the event that the Chairperson or Vice-Chairperson is unable fulfill their duties, the Treasurer shall assume said duties.

Section IV: Members.
Duties of the Members include: attending all meetings, being knowledgeable about the Committee's policies and procedures, being knowledgeable about the matters before the Committee, voting without bias, and abstaining from voting if members possess a personal connection and/or relationship to any organization that would interfere with their ability to be unbiased.

Section V: Vacancies
Should vacancies arise within Executive Board, new members must be elected from within the existing Committee within two (2) weeks of the vacancy. Should vacancies arise within the general Committee membership, candidates shall submit an application that will be available to all interested and qualified persons. Applications shall be reviewed by the currently active members of the general Committee. New members will be installed by a majority vote of the currently active members present at an official meeting. The application process shall start as soon as the vacancy arises and must be filled within three (3) weeks.

Section VI: Recall
Any member may be recalled by a two-thirds vote of the Committee. Any member of the Committee may move for recall in Executive Session of a regular meeting. Sufficient cause for recall may include: two (2) unexcused absences, inability to fulfill the aforementioned duties of a position and/or executive responsibilities.

Section VII: Advisors
Advisory non-voting members shall be the Director of Student Activities and Community Services, who shall act as the administrative liaison to the Committee, and the Assistant Vice President for Business and Finance, or his/her representative. These non-voting members shall be granted speaking privileges while organizations are in the conference room, and he/she may only respond to questions from the Committee.

Article III: Meetings
Section I: Weekly Meetings Committee meetings shall be held weekly during a publicized time.

Section II: Executive Session All Committee members retain the right to motion for Executive Session, which will be granted by a majority vote. Executive Session is only open to members of the committee as well as their advisors.

Section III: Quorum
A quorum (two-thirds of the membership) must be present to hold a Finance Committee meeting.

Section IV: Allocations
Allocations of funds must be approved by simple majority vote of the members present.
The Committee Chairperson will only vote in the event of a tie between the other
Committee members.

Article IV: Committee Responsibilities
Section I:
The Finance Committee has the responsibility of overseeing all club expenditures and has
the ability to audit an organization's books at any time. If the organization is found to have
any violations, that organization can be revoked, put under receivership, and/or referred to
the Honor Council.

Article V: Amendments and Revisions
Section I:
All amendments to, and revisions of, the University of Mary Washington Finance
Committee Constitution must be:

1. Introduced by a matriculating student at University of Mary Washington in a public
   forum, including but not limited to a Finance Committee meeting, for discussion.

2. Approved by a three-fourths vote of the current Committee membership.

3. Approved by the Committee' advisors.

Amendments will go into effect immediately upon passage. It is the responsibility of the
Vice-Chairperson is to disseminate any and all changes to the campus community.

THE UNIVERSITY OF MARY WASHINGTON FINANCE COMMITTEE BYLAWS

Article I: Budgets and Budget Hearings
Section I. Budgets
To receive funds, all budgets shall be properly completed on the official Finance Committee
Budget Form or other approved format.

1. A mandatory budget training workshop shall be held at least one (1) week prior to
   Spring Budget Hearings. Any organization failing to attend shall incur a 10 percent
   budget reduction.

2. Any budget that is submitted after the deadline for initial budgets shall incur an
   initial 10 percent budget reduction prior to the Committee's review of said budget.
   Clubs that are established after the Spring Budget Hearings are exempt from this
   reduction.

3. Upon review of each budget submitted, the Committee may take into consideration the amount allocated in the previous year, as well as current expenditures to date.

4. At the end of the school year, if an organization's account contains 30 percent of its total allocation leftover, an additional 10 percent reduction shall be applied to that organization's allocation for the following year before across-the-board reductions.

5. Any organization that has a pre-established contractual agreement will not incur the budget reductions against the amount committed to by these contracts.

Section II. Spring Budget Hearings
1. Spring Budget Hearings shall be held no later than April 10 of each year. The Vice-Chairperson shall publicize Spring Budget Hearings in the appropriate venue.

2. At least three (3) weeks before the beginning of the Spring Budget Hearings, the Chairperson must notify the leaders of the student organizations.

3. A knowledgeable individual from the club requesting funding must be present at the Budget Hearing. Additional officers of the organization may also be present.

Section III. Notification of Allocation
Organizations shall be notified of the amounts allocated for the following year at Fall Finance Committee Workshop or earlier if possible.

Section IV. Rollover
Organizations with self-generated revenue remaining in their accounts at the end of the spring semester may have this revenue carried over to the fall semester. There is no guarantee that clubs will be granted the complete amount of the rollover. Self-generated revenue is defined as revenue generated without the use of any financial support from the Finance Committee.

Article II. Financial Procedures
Section I: Accounts
1. All organizational funds must be kept with the Business and Finance Office. Organizations which receive funds from the Finance Committee may not maintain an account outside of the Business and Finance Office. If such an account is discovered, the organization's campus account shall be frozen until all funds are moved into the authorized account. Further action may also be taken as deemed necessary by the Assistant Vice President of Business and Finance or the Finance Committee.

2. Any revenue generated from projects not receiving seed money from the Finance Committee must be deposited in its organizational account and may be spent on items the organization deems appropriate except for alcohol, tobacco, illegal substances, and illegal activities.

Section II: Recording and Reviewing Accounts

1. Organizations are required to maintain current and accurate financial records, which may be reviewed periodically by the Finance Committee. These records should be passed on from year to year; they can be used as examples, and may contain convenient reference materials.

2. Any organization may be required, upon notification from the Finance Committee Chairperson, to submit a financial report detailing all revenues and expenditures to date.

3. The Finance Committee is responsible for reviewing all revenue and expense reports and taking any necessary actions. The Office of Business and Finance may furnish the committee with information regarding an organization's account.

Section III: Deficits
1. If, at the end of an academic year, an organization shows a deficit in its account, the club shall be placed on probationary status for the next academic year, shall become subject to quarterly financial review by the chairperson, and may also become subject to a reduction or cancellation of future funding.

2. If, during an academic year, an organization goes into debt, its account may be closed until the club establishes its financial viability.

Section IV: Additional Funding
1. It shall be at the discretion of the Finance Committee to provide additional funding for an event that has previously received allocation.

Section V: Dues
1. When allocating money for annual budgets, the committee may assume dues of $5 per person for each existing member of that club.

Article III: Finance Requests
Section I: Requirements
In order to be heard by the Committee:

1. Requests for allocations must be presented to the Finance Committee during one of their meetings at least two (2) weeks prior to the proposed event date.

2. Ten copies of each organization's request must be submitted at least three (3) days before the advertised committee meeting. Organizations lacking ten copies will not be heard on that date.

3. Organizations who have failed to educate themselves as to the policies and procedures of the committee shall not be approved until a proper request is presented (see form). Questions concerning the procedures and format of requests should be submitted to the Chairperson of the Finance Committee at least three (3) days before the Committee's official meeting time.

4. When the cost of a single line item is $1000 or more, a copy of documentation of the cost must be submitted with the budget request. This includes conference fees, food purchases and contracts.

5. Organizations receiving allocations for equipment or other items that are considered reusable must maintain and present an updated inventory of that equipment each semester. Failure to do so will result in no additional funds awarded until this requirement is met. A copy of this inventory is to be presented to the Finance Committee at the close of each semester.

6. Fees for speakers, bands and other performing artists must be inclusive of travel. Fees must be demonstrated by the organization requesting funds as being reasonable by comparing the cost to similar artists who can provide the same service.

7. Requests for travel to conferences must follow the requirements set forth by Business Services.

8. Any newly registered student organization or any student organization that has been inactive for one year or more must be listed as a registered organization by SAE for three full months during the academic year before becoming eligible to request funds.

9. Any registered student organization that receives funding during the Spring budget process for the following academic year that fails to re-register by September 30 of that year shall forfeit the allocation and will not be eligible to request funding again until their registration is current for three full months.

10. Members of the Finance Committee will be asked to submit a list of the groups in which they hold membership or have held membership and may be asked to leave the room during Executive Session when applications from these groups are under consideration. Their vote will be recorded as an abstention.

Section II: Notification of Allocation
1. The Finance Committee reserves the right to vote via email at the discretion of the Chairperson; the same rules to voting apply.

2. Notification of the Finance Committee's decision regarding club requests shall be made no later than twenty-four (24) hours after the aforementioned decision.

Article IV: Amendments and Revisions
Section I: Amendments
1. All amendments to, and revisions of, the University of Mary Washington Finance Committee Bylaws must be:

a. Introduced by a matriculated student at the University of Mary Washington in a public forum, including but not limited to a Finance Committee meeting, for discussion.
b. Approved by a majority vote of the current Finance Committee membership.
c. Approved by the Committee's advisors.
d. Amendments will go into effect immediately upon passage.

2. It is the responsibility of the Vice-Chairperson to disseminate any and all changes to the campus community.

Article V: Governance
Section I: External Governance
The Finance Committee will not, under any circumstances, be considered an official committee under the Student Government Association or any other student-governing body at the University of Mary Washington. The Finance Committee shall always remain an independent, autonomous, unbiased body.

Section II: Finance Committee Elections
Finance Committee elections shall be an application process only. In the event of a competitive election, the campaigning process will follow the rules set by the Election Rules and Procedures Committee. Workshop attendance is not required for those seeking to serve on the Finance Committee. Any questions regarding the election process shall be directed to the Finance Committee Chairperson.

THE UNIVERSITY OF MARY WASHINGTON FINANCE COMMITTEE POLICIES OF INTEREST

Audits
The Finance Committee, with approval of SAE, has been authorized to freeze the funds of any organization that has received an allocation if that organization fails to:

Observe the procedures of the Finance Committee.
Observe the procedures for spending State funds as outlined by Business Services.
Observe the procedures outlined in the Student Organization Policy Handbook.

Upon doing so, the Finance Committee shall conduct an investigation in the form of an audit to determine whether or not there have been any inappropriate expenditures. For other violations, the organization will be referred to the ICA for review. Funds will be held until ICA has completed its review. In the case where the results are determined to be of a serious nature, the information will be turned over to Judicial Affairs and the Dean of Students for action.

Bonding
Money will not be allocated for purposes of bonding, as this does not benefit the entire campus in any way.

Business/Club Bonding Dinners or Events
These will not be funded as they do not benefit the entire campus.

Conference Travel
The following guidelines are in effect for conferences:
- There is a 2 person limit per group.
- Expenses will be limited to travel, registration fees and hotel. While the University may approve more, the Finance Committee will only cover up to 100% of the per diem rate allowed for hotel rooms in the city where students are staying.
- Either the group or the student traveler will be expected to pay some portion of the cost of the travel related expenses (note: conference attendees will be responsible for paying for their own meals unless the club decides to use their own money).
- Documentation for the cost of travel is required at the time of request. All allocations for travel must be in accordance with the Commonwealth of Virginia travel guidelines, which includes 3 quotes for hotel and airfare.
- Travel for which academic credit is given will not be funded.
- Only 1 senior will be funded for conferences held in the fall. The Finance Committee will not cover any conference expenses for a senior in the spring semester.

Decorations
Materials and supplies to include decorations must be itemized on the budget request. Frivolous requests for decorations will not be funded.

Food
Food for conferences and/or travel are not allowed unless included in registration fees.

Food for receptions/dinners must meet the following criteria:
- The event must be open to the campus community. This money cannot be used to support food items for non-UMW members.
- There cannot be any "head of the line" privileges granted.
- The event must be publicized throughout the campus community.
- Funds from the Finance Committee can not include funds for alcohol purchases, bartenders, licenses, security, or any other alcohol related expense that arises from the service of alcohol at your event. This does not include non-alcoholic beverages or food items.

Gifts
Not allowed.

Income
If Finance Committee funds are used to generate revenue, that money will be treated as a loan from the Finance Committee. Revenue generated in excess of the loan will remain with the club after the loan has been repaid. Clubs are required to voluntarily return the funds borrowed. All funds in excess of the amount granted to them by the Finance Committee may be spent on items the organization deems appropriate except for alcohol, tobacco, illegal substances, and illegal activities.

Continual fundraising projects should be held by groups as this is a way to offset expenditures for programs and to fund programs not funded by the Finance Committee. All income MUST be deposited into the club's account. No cash is to be spent or donated without using the established purchasing procedures. Failure to abide by this policy will result in a 1 year suspension of funding from the Finance Committee.

Items the Finance Committee will not fund:
- Any event with total line items in excess of $4000 that is scheduled less than 3 weeks from the date of initial presentation to the Finance Committee.

- Office supplies, letterhead, business cards, telephones, or any other office related expense unless the group has an official office space dedicated to them.

- Individual membership dues.

- Activities which are considered to be part of a student's normal expenses for attaining credit towards a degree.

- Travel where academic credit is given.

- Any fee, deemed to be the fault of a student organization, that results from failure to pay an invoice in a timely manner or an additional charge imposed for failing to meet a payment deadline. This includes the payment of invoices which cross budget years.

- If an organization has already made a commitment (signed a contract, prepaid an expense, traveled, incurred an expense through a University-related department) prior to requesting funding, the request may not be considered and may not be funded.

- Supplemental or additional conference costs not included in the regular registration fees, to include but not limited to, pre- or post- conference charges, sight-seeing trips, additional mileage due to side trips, etc., will not be funded.

- Philanthropic contributions or direct financial contributions to an enterprise.

- Activities which are considered to be part of a student's normal expenses for attaining credit towards a degree; this includes the purchase of textbooks, class books, external test preparation books, or books contributing to an academic or club library. Students will be encouraged to go to academic departments for such funding.

- T-shirts or other imprinted items for club members.

- Expenses related to activities that constitute lobbying or electioneering.

Large Purchases
The Commonwealth of Virginia requires that all expenditures in excess of $5000 must be competitively bid. This is a function of the Purchasing Department and is coordinated through the staff in SAE.

Membership
Budget Requests must include the total number of members in the group. This number will be used when allocating funds. Falsifying this information is an Honor Council violation and the person presenting the request will be charged with the violation.

Mileage
Reimbursed per mile at the rate set by the Finance Committee (gas purchases are included in the mileage rate and cannot be reimbursed separately). Currently, the rate being used is $.20/mile. Note: You must submit a physical address for the destination.

Money will not be given for donations

Organization representative must be able to be reached within and up to one hour after requesting money

Prizes
Documentation is required by Business Services for all prizes purchased through funds allocated to student organizations using the Gift Log form.   The log must contain additional information for prizes in excess of $49.99, and for all gift cards or gift certificates regardless of value and must be submitted to SAE the next business day following your event. This information includes: printed name of the winner, banner number or full SSN, address of the winner, signature of the winner, and the description and value of the prize. See the staff in SAE for the correct format.

For winners of prizes in excess of $600 (this is a cumulative total over the calendar year of gifts from any and all departments and groups here at UMW), the winner will receive a 1099 as they are subject to paying income tax.

Groups are limited to a $500 total for prizes or they must itemize their purchase on the green form.

Prizes purchased from funds allocated by the Finance Committee may only be awarded to students.

Publicity/Printing Expenses
There cap for publicity/printing expenses is $30 for the year for small clubs; $200 for large clubs with a large number of campus events and where these events draw a significant number of students to the event.

T-shirts/uniforms
The Finance Committee will no longer fund t-shirts or uniforms.

Two week rule on requests (part of the bylaws)
Need to request money 2 weeks prior to the event being held or attending a conference or the request will automatically be denied.

Website: students.umw.edu/~finance
Bylaws can be found on the website.
Forms – requests will only be reviewed if they are on the correct form.

When requesting money,
Bring:

- Budget with up-to-date account balance
- Organization's constitution
- Organization's requests

A person representing each group co-sponsoring the event shall be present and must be able to explain the request in detail and how this will further the mission of the club to include the contribution from the group they are representing.

The group shall disclose any and all alternative means of funding either received or being actively pursued from other organizations or sources.

The Finance Committee will not fund reimbursements for items not previously listed in the club's budget, regardless of the method of payment used.

Remember not to pad your budget or falsify the amount needed. Doing so is an Honor Council violation and the student requesting funds in the name of the organization will be referred to the Honor Council.

Resources for Student Leaders

This handbook covers information about how to start and operate an organization while staying within the boundaries of the policies set forth by the University of Mary Washington and the Office of Student Activities and Engagement. It provides students and faculty with the information about the offices and resources available to student organizations/clubs on campus.

This section, however, is primarily for organization and campus leaders. The SAE staff compiled several resource files we think will be beneficial to you as leaders, and your organizations. This file covers a range of topics from leadership skills to delegating tasks and recruiting new members. It serves as a resource to help you manage your club more efficiently and alleviate stress. Feel free to share these pages with other members of your group. These resources are available online as well:

- Getting Started as a Leader
- Deciding on a Style of Leadership
- The 10 Commandments for Effective Leadership
- Recruitment and Retention of Members
  - Recruiting New Members
  - Finding Those New Members
  - The Golden Rules of Recruitment
  - Retention
- Basic Needs of People in Groups
- 5 Phases in the Creative Process
- Managing with Creativity
- What is Creative Thinking?
- How to Stifle Creativity . . . Without Really Trying
- Group Decisions
- Brainstorming
- Delegating Responsibility
  - Guidelines for Effective Delegation
  - Working with Student Committees/Volunteers
  - Successful Techniques for Group Negotiations
- When Delegation Fails
- Effective Meeting Checklist
- Minutes and Record Keeping
- Time Management
- Leadership Transition
  - Using a Transition Notebook

Getting Started as a Leader

Congratulations! Your peers have elected you as a student leader; you are feeling great! Yet, you are most likely a bit scared, too. You've received the position you've wanted for so long, but perhaps you are experiencing a little doubt—you want to give it your all and be the best officer your organization ever elected; you want everything perfect for the first time and no mistakes. These are wonderful intentions, though perhaps somewhat unrealistic. People are fallible and mistakes are inevitable. However, success is more than possible and below there are a few ideas to jumpstart your thinking so you can avoid many of the common pitfalls and transition to a smooth new start in your position. So, relax, get comfortable, and read on!

IF: You want to learn more about leadership opportunities, such as leadership classes, conferences, institutes, handouts and other resource materials…

THEN: Come to the SAE office and speak with a member of our staff. A number of your questions might also be answered by reviewing the Student Organization Handbook online.

IF: Your organization has an office in the SAE suite…

THEN: Submit a list of the names of your members that will require keys and after hour access using their student ID card, and make sure you and your members check out keys to your office from the front office in SAE.

IF: You are seeking financial support from the Finance Committee…

THEN: prepare a budget and submit it to the Finance Committee. Make sure to sign up to meet with the committee. Requests are due by 4 pm on the Thursday before the Sunday night Finance Committee meeting at which you wish your request to be heard. See the Finance section of this handbook for more information on the Finance Committee.

IF: Your organization has a Treasurer…

THEN: Make sure he or she keeps an up-to-date financial record.

IF: Your organization has a Historian…

THEN: Have the exiting officers submit an end-of-the-year report to him or her recounting their work for the organization.

IF: Your organization has a Secretary…

THEN: Affirm that he or she has everything he or she needs from the previous secretary (i.e. meeting minutes, membership rosters, etc.).

IF: You would like to have a smoothly running organization right from the start…

THEN: Have the exiting officers provide transitional training to the new or incoming officers through written and orally guided instruction.

IF: You need to learn how to reserve a room in a campus building, use campus vans, or another of the dozens of University services…

THEN: Ask us in SAE!

Deciding on a Style of Leadership

The style of leadership that you choose will have a tremendous impact on your organization. You want to develop a style that you feel comfortable with and that will motivate the members of your organization to achieve the group's goals. What might prove helpful is to examine the styles of the previous officers. Write down what you like and dislike about the method in which goals were or were not achieved, and why. By doing so, you can discover what you believe is important to the organization.

For instance:

- Are you people-oriented (Focusing mainly on **how** your members are doing); or are you task-oriented? (Focusing on **what** your members are doing)

- Do you place a high priority on relationships (camaraderie), or is it more important to get a job done?

- Should all the members contribute to decisions, or should the officers decide the organization's goals and then present them to the group?

- Will you achieve goals by "going it alone" or by forming different committees (e.g., social committee, publicity committee)?

- What would you suggest the group goals might be for the year?

Ultimately, which style (i.e., authoritarian, consensus, participative, etc.) – in your judgment – would help the organization accomplish its goals most effectively in each situation?

As you develop your Style of Leadership, review the following resources included in this handbook periodically. Some sections may not apply right now, but there will be times when they will and having some insights will help you become a better leader and ultimately, help you define your leadership style.

The 10 Commandments for Effective Leadership

1. Believe in someone (or something) other than yourself.
2. Listen to others.
3. Work with the team. Never be a loner.
4. Be considerate of different opinions.
5. Stand up for what you believe in—even when you're criticized for it.
6. Be a peacemaker.
7. Be patient with others, even though they may not agree with you.
8. Stick to the promises you make (write them down so you remember them).
9. Work hard.
10. Thank people for what they do, even though you may not receive thanks for what you do.

Recruitment and Retention of Members

Recruitment. It's the challenging, exciting, and often frustrating experience of bringing new members (and therefore new energy, new initiative, and new ideas) into your organization. When thinking of new members, focus on:

- Attracting people to your organization.
- Giving them reasons to stay once they join.

Recruiting New Members

People join organizations for many reasons: they want to get involved, meet people, make new friends, explore interests, develop leadership skills, and have fun. Groups need new members because they bring new ideas and talents, in addition to replacing old members.

With over 130 existing groups on campus, as well as new organizations forming, it is vital that an organization has a well-conceived and well-executed recruitment and retention plan. These pages are designed to assist you in the development of such a plan.

FIRST, IT IS IMPORTANT THAT BOTH THE LEADERSHIP AND MEMBERSHIP KNOW AND UNDERSTAND YOUR ORGANIZATION.

Have a meeting to review and discuss your organizational goals and objectives. Are they still accurate? Is it time to update them? Where would the group like to be in six months? A year? During this "organizational housekeeping" process, a certain theme or direction should become clear. These themes can then be crafted into organizational goals. What types of people do you need to help the group move toward those goals? Who would complement your current membership? It may be useful to develop a member profile, outlining the type of individual that would most likely be interested in your club, a target group of sorts.

Now that you know the types of people you are interested in, your next step is to set some recruitment goals. How many new members can your organization reasonably assimilate into the group? Will you allow people to join at any time or only during a designated recruitment period? Will you hold a mass meeting or is membership by invitation only? Then design your recruitment strategy, keeping in mind your member profile. What places do these prospective members most likely frequent? Do they have special interests? What kind of publicity would attract their attention? But most of all, try to think back to when you first became involved. What attracted you? How were you recruited? If you weren't recruited at all, how did you hear about the group? Why have you stayed involved?

Get Everyone Involved

Have your current members identify people they know who may want to join and personally invite them to attend a meeting. Word-of-mouth is the best form of publicity, and least expensive too. Talk about your group.

Recruitment campaigns need to have a visual element as well. Have those members with "artistic talents" work on your posters, fliers, and banners, etc. Be creative. Your publicity can be effective only if it's noticed. Many groups find it beneficial to have a special welcome meeting for their new members. Group participation in some form of official initiation or induction process is one way to make your members feel wanted, needed, and appreciated. It helps to form a unique and memorable bond between old and new members and will help increase your retention rate.

However you choose to welcome your new members, it is important to include some form of group orientation program. Many groups skip this and begin by getting new members immediately involved in group projects. Although new member involvement is essential, it is equally important to orient them to your group's goals and objectives, organizational structure, rules and norms. This de-mystifies the group and helps the members feel more comfortable with the group, fostering understanding of group processes. Proper orientation leads to better understanding, more commitment and much less frustration or tension among members.

Finding Those New Students

Prior to actual recruitment, you should have already spent some time with your current members defining the purpose of your organization, and identifying the benefits of membership in your group. It's helpful to be able to tell potential members what your group does and what they will gain from their involvement. Establish goals for the current year and plan a few activities consistent with your Statement of Purpose (refer to your club's Mission Statement).

Ten Ways to Recruit New Students:

1. Talk to your friends or students you believe would be interested in the activities of your organization. Tell people what you have to offer them. Ask them about themselves (and really listen). Tell them how the organization can benefit from someone like them. Let them know how their talents, skills and interests would help the organization.

2. Send out general notices or brochures, and use the SAE Weekly News or the campus newspaper to advertise how and when students may sign up to join your organization. Keep notices short and appealing. Include some of the benefits of involvement.

3. Sign up for a table at Club Carnival each fall and spring and use the space to gather names of interested students. Personally invite these students to a meeting - it is easier to "say no" to a poster than to "say no" to a person.

4. Have each existing member bring in one new member to the next meeting.

5. Talk to the RA's and ask them if they know of students who may be interested in joining your organization. This can be done periodically throughout the year.

6. Set up a table in the Woodard Campus Center lobby with a display highlighting some of the activities sponsored by your group.

7. If your group is sponsored by an academic department, ask for a few moments in each class offered by the department to make a pitch.

8. Keep your group as visible to the rest of the campus as possible. If you plan to order club shirts, do it at the beginning of the year when students are looking for new ways to get involved and have your members wear them on club meeting days.

9. If you need students with special talents (i.e. artists, musicians) or if your organization's purpose attracts certain majors, ask faculty in that department for suggestions. Academic Departments may also allow associated student groups to advertise on specific bulletin boards or in departmental publications.

10. Follow up all possibilities ... make sure each interested individual is personally contacted. Sending special invitations is another nice way to invite new members. Keep talking with those who don't appear at the meetings. They may still be interested but are unsure about your group and may need convincing.

The Golden Rules of Recruitment
Be ready with specific tasks for new recruits:

- Have a clear idea of what you're recruiting for.
- Develop a well-defined problem for new recruits to handle.
- Give them a realistic strategy for addressing it and a concrete, feasible way to implement the solution.

Use active recruitment technique:

- Try direct, person-to-person contact.
- Speak in classes and to other campus groups.
- Speak in residence halls and hand out flyers at events.

Follow up as soon as possible after the initial contact:

- Make a telephone call or schedule an individual meeting, depending on the person's sense of involvement.
- Invite them to lunch and ask other new contacts as well as other members to join you.
- Follow up within a day or two, maximum, after your initial contact.

Recruitment doesn't end with the initial contact – you have to find ways to make new recruits feel welcomed, productive and wanted!

Retention

So You Have Some New Members. Now What?

After you've successfully completed your recruitment and orientation, spend time getting to know the membership and let them get to know you too. Don't forget your old members since without them, you wouldn't have had a group for your new members to join. Talk to all new members about their skills, interests and previous experiences. Once you have this information, it will be easy to get them involved in your group's projects. To be sure that their first organizational experience is a positive one, assign new members tasks that are well within their skill level and that they can successfully accomplish.

PEOPLE JOIN ORGANIZATIONS FOR MANY REASONS:
- To meet new friends.
- To have their opinions heard.
- Because they have a particular skill or interest they want to express.
- To satisfy needs for affiliation, power, or achievement.
- Because they like to be involved in decision-making.
- Because they want to learn new skills.
- Because they want to list their student activities on their resume.

Basically, people join to have their needs met.

PEOPLE STAY IN ORGANIZATIONS FOR MANY REASONS:
- Because they are making new friends and enjoying it.
- Because they are learning and growing.
- Because something is being accomplished that they can take pride in.
- Because they feel their opinion and work are valued.
- Because they feel they are appreciated.

People continue their involvement because they feel needed and their absence would be noticed. Schedule convenient and regular meeting times, make these meetings worthwhile and organized. Also keep members informed; especially those who can't make the meetings due to other commitments or conflicts.

THE PRESIDENT OF THE ORGANIZATION CAN HELP GROUP MEMBERS MEET THEIR NEEDS:

- By taking time to get to know each member personally.
- By showing an interest in the total person instead of just what happens at a meeting.
- By delegating tasks to different members so that each has a reason to come to meetings and to stay in the group.
- By encouraging shy members to speak up.
- By having the entire membership decide democratically on programs.
- By providing the information a member needs to work on a task he/she has been given.
- By providing and maintaining an environment at meetings where members feel safe to speak up and offer different opinions.

Especially at the beginning of the year or semester, make time to have new and old members interact and become acquainted.

Finally....

Allow your new members time to get involved and feel comfortable with the group. After a semester, have them participate in a group evaluation process. Go over your organizational goals and objectives and look at your plans for the future. Ask for their feedback and input. It is a known fact that people are more committed and motivated if they feel that they have a stake in what's going on. Have them help to shape the organization but also have time to socialize and celebrate your achievements. If all you do as a group is work, it will become a burden to participate and your members will quickly lose interest. After all, what is an organization without members? What good is a recruitment campaign if no one stays? Make sure that you have fun while you work!

Basic Needs of People in Groups

Dear Leader,

If you want my loyalty, interest and best efforts as a group member, you must take into account the fact that...

1. I need a SENSE OF BELONGING

   - A feeling that no one objects to my presence
   - A feeling that I am sincerely welcome
   - A feeling that I am honestly needed for my total self, not just for my hands, my money, etc.

2. I need to have a share in planning the group goals. (My need will be satisfied only when I feel that my ideas had a fair hearing.)

3. I need to feel that the goals are within reach and that they make sense to me.

4. I need to feel that what I'm doing contributes to human welfare - that its value extends beyond the group itself.

5. I need to share in making the rules of the group - the rules by which, together, we shall live and work toward our goals.

6. I need to know in some clear detail just what is expected of me so that I can work confidently.

7. I need to have responsibilities that challenge, that are within the range of my abilities and that contribute toward reaching our goals.

8. I need to see that progress is being made toward the goals we have set.

9. I need to be kept informed. What I'm not up on, I may be down on.

10. I need to have confidence in our leader; confidence that is based upon assurance of consistent fair treatment, of recognition when it is due and trust that loyalty will bring increased security.

IN BRIEF: The situation in which I find myself must make sense to me regardless of how much sense it makes to the leader.

5 PHASES OF THE CREATIVE PROCESS

Creativity requires all involved to put forth a great deal of effort. This process tests the ability of groups to work together as a team to develop a concept, to openly discuss options without fear of reprisals, to allow each member to dream their dreams, and to learn more about each other while doing so!

In their book *The Creative Manager*, Russel and Evans have identified 5 phases in the Creative Process:

- **Preparation:** Involves analyzing the task, gathering data, looking for patterns, trying out ideas, and questioning assumptions.

- **Frustration:** Occurs when we are unable to resolve the issue; feel bored, irritated or despondent; and doubt our own ability.

- **Incubation:** Occurs when we give up trying, put the issue on hold, and hand it over to the unconscious mind.

- **Insight:** The inspiration, the "aha", the moment we normally associate with creativity.

- **Working out:** Involves testing our insights and giving them form.

(Excerpt from Russel, P. and Evans, R. (1992). *The Creative Manager*. San Francisco: Jossey-Bass.)

Managing with Creativity

To prepare your group to embark on the Creative Process, ask them to work through the following exercise:

To have a creative environment, we need to think in terms of what we can do and not focus on, or concern ourselves with, the outcome. Let your mind wander through all of the possibilities.

As a rule, our society does not allow us to fail or to take risks. We are taught to think of things in certain terms or in certain ways.

1. For example, given the Roman number IX (nine), change it to 6 given one single line to work with.
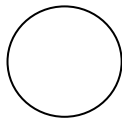
   [Answer: Add a double curved line, or S, in front of the IX.]

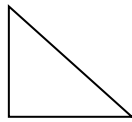2. Given the Roman number IX (nine), change it to 6 using any combination of symbols or characters.

   [Answer: I X 6 = 6]

But how many of us would have thought of those approaches to solving the problem?

3. Look at the following and determine which is different:

| A | B | C | D |

   A. Has no points
   B. Has no curves
   C. Semi-circle made up of a straight and curved line
   D. Symmetrical curves joined together at the ends

   [Answer: They're all different, yet they all share one thing in common. They're all solids; completely enclosed areas.]

Use these to get the Creative Process started with your group. The group will be surprised on how they may have allowed their frustrations or inability to see a new solution to get them to put an idea on hold or even give-up while others will see how working together to determine a solution pays off!

What is Creative Thinking?

"Creative thinking requires an attitude that allows you to search for ideas and manipulate your knowledge and experience." - Roger von Oech

Ten mental blocks to creative thinking:

* The right answer	* That's not my area
* That's not logical	* Don't be foolish
* Follow the rules	* Avoid ambiguity
* Be practical	* To err is wrong
* Play is frivolous	* I'm not creative

When we use terms like "logic", "reason", "focused", or "exact", we are using words associated with our practical side. But terms like "metaphor", "humor", "play", or "dream", are associated with our creative or "fun" side.

We've been taught to be governed by rules. This can block our creative approach as we start to look for patterns to determine the idea's to pursue.

Example: Given 1 - 4 - 9 - 16 - 25, what's next (36)

We watch patterns in our society to determine the next move.

Consider the phrase "Rules are meant to be broken"; a new pattern can develop, thereby bringing about a change in the pattern. Sometimes breaking the rules may bring good solutions.

"Be practical" means to think in terms of the norm. Sometimes it is better to think in terms of "what if" and imagine how others would do it.

When we say play is frivolous, we sit and wait for instructions. We forget how to play; how to turn an uncomfortable situation into fun; how to make it into a game.

When we avoid involvement in another area, we start to become experts in our own area as we learn more and more about it. However, we tend to forget about all of the other people around us (kind of like the research professor). What could a coach and Student Activities Director learn from the other? Both use practice, evaluation, training aids, & goals to explore how others do it in their respective areas. Both are looking for ways to get their message across. Maybe one has the solution the other needs, but they'll never know if they avoid involvement with each other.

Avoid ambiguity? People are the only ones who can be ambiguous since it relies on language as a vehicle to get the message across.

Example: Remove 6 letters to come up with a common word in the English language from the following: BSAI NXLEATNTEA RS

[Answer: Banana]

This exercise used an ambiguous statement to allow you to come up with your creative response.

Society wants us to conform and lives by the rule "The nail that sticks up gets hammered down". Instead, we should let the nail stick up or stick our heads out once in a while. Instead of "don't be foolish", learn to reverse your thinking.

To err is wrong? We all remember our successes. But we tend to forget the number of failures it took to get there. Without failure, we don't look at solutions to possible problems (we don't want to be wrong). Failures are excellent opportunities to learn: about ourselves, our organization, and ways to do things better in the future.

To all who say, "I'm not creative" - the answer is "FALSE." You create your own self prophecy.

To work creatively:

- Be dissatisfied
- Map out your plans
- Take a whack at it
- Get support
- Have something at stake
- Get rid of excuses
- Be courageous
- Give yourself a deadline
- Fight for it
- Be persistent

Following this system will help you to increase your level of creativity.

How to Stifle Creativity – Without Really Trying!

You've heard them all before but have you ever looked at a list like this and asked yourself why you let concepts like these stop you and your group from exploring a new idea? Check the list over – you'll be surprised how many times someone has used these phrases!

A great idea but . . .

It won't work

We don't have time

We've tried that before

Good idea but our club is different

There are better ways than that

It's against club policy

You haven't considered . . .

Sounds foolish

Too modern

Let's discuss it at some other time

Why start anything now?

They won't use it

That's not how we do things here

I just know it won't work

Let's be practical

That's not our problem

Too many headaches

Why waste time on that?

We've never done it that way

It's not our job

Too expensive

Not ready for it yet

It's not good enough

What will the administration think?

Who do you think you are?

We don't have the money

Let's not step on anyone's toes

Too old fashioned

You don't understand your problem

They won't understand

We have too many people now

What bubblehead thought that idea up?

Let's form a committee

We need to study this more

Our President says it stinks

We don't know anything about it

Think about it! Your group can spend time using these excuses or they can spend their time coming up with great ideas! *The choice is yours!!!*

Group Decisions

Every day, we all make decisions. Some decisions common to all students are:
- What time to get up and what time to go to sleep
- Whether or not to shower
- Whether or not to go to class
- What to eat, when, and where
- What time you will study and where

These are all decisions that you make as a student as you manage your daily routine.

So, what types of decisions do clubs make?
- Meeting day and time
- Meeting agenda
- Election of officers
- Programs to sponsor
- Whether or not to form a specific committee
- To co-sponsor at an event
- Community service programs
- How to recruit new members
- How to advertise events and programs

How do clubs make these? What are the factors that help them make these decisions? What should the group look for when choosing a specific path?

Groups use the personal likes and dislikes of their members; the relationships and personalities of the people involved; and their values (things they have great feelings or passion for) as they make decisions.

Start by identifying some of the factors that affect how decisions are made:

- **Lack of Time:** Membership involvement takes time, and membership involvement is essential to quality decision making and to member commitment to a decision. To avoid pitfalls, stay on top of things and plan ahead - anticipate problems. To "take the time" may require extra meetings, special committees, and/or taking time from other priorities.

- **Lack of Skills:** Before making a decision, did your group look at:

  o Clarity - Are we sure we understand what this decision means? Are we clear on what the problem really is? Before making a decision, we must identify the problem, define the problem, find ways to solve it, and discuss the ramifications for each course of action. What does it mean if we go down this path?

o Gathering all of the information needed - By knowing all of the facts, we will be able to choose a course of action. Explore each of the alternatives fully. Appoint a recorder to take down all ideas.

o Group communication - Was everyone's opinion voiced or did someone monopolize the group or stifle discussion? Was everyone who needed to be there present to offer their opinion? Here's a perfect opportunity for group "brainstorming".

o Premature decisions - is it too early to make this decision? Do you have all of the facts?

o Climate - Are we comfortable in making this decision? Was the atmosphere in the room supportive, trusting and cooperative? If so, even the shyest of people will feel comfortable in offering their opinion.

o Conformity - Are we deciding this because that's what's expected of us? Is this the way we always do it? Am I voting for this because everyone else feels I should? Am I conforming to what someone in the group wants to avoid a confrontation with them? Did someone in the group slow down the development of different or diverse ideas?

o Inquiry/problem-solving skills - Do we possess good inquiry skills? Do we pose good questions? Do members feel comfortable speaking out in this group?

o Motivation - Why are we making this decision? Are we being persuaded to make a decision because someone else feels the need for an immediate solution? Does everyone see the importance of the problem and the necessity for a solution?

What to look for during Group Decision Making Process
- Participation: Look at the differences in the amount of participation among members. Who are the high participators? Who are the low participators? Has there been a shift in the level of participation in any one person?

- How are silent people treated? Is their silence treated as consent? Disagreement? Disinterest? Who talks to whom? Who keeps the ball rolling?

- Influence: Some people may speak very little and still capture the attention of the whole group. Others may talk a lot only to be tuned out or ignored by the group. Influence may be negative or positive; it can enlist the support or cooperation of others, or alienate them. Which members are high in influence? (i.e. who's listened to when they speak?) Which members are low in influence? (i.e., who isn't followed

or listened to?) Is there any shifting in influence? When? Is there a struggle for leadership? What effect does this have on the membership?

Consider the individual "Styles" of the membership:
- Autocrat: Tries to impose his values or will on other members of the group. Pushes for support of his decisions. Evaluates or passes judgment on other group members. Blocks action when it doesn't move in the direction they desire. Pushes to get the group organized.

- Peacemaker: Eagerly supports other member's decisions. Consistently tries to avoid conflict or unpleasant feelings.

- Laissez faire: Gets attention by their apparent lack of involvement. Goes along with group decisions without committing one way or the other. Seems to be withdrawn or uninvolved. Does not initiate activity. Participates only in response to another member's questions.

- Democrat: Tries to include everyone in a group decision or discussion. Expresses his feelings and opinions openly and directly without evaluating or judging others. Appears open to feedback and criticisms. When feelings and tension run high, tries to deal with the conflict in a problem-solving way.

Some Reasons for Group Indecision
- **Fear of consequences:** Are members concerned with what others will think of the group or individual members? Of the decision? Many will ask themselves if they will be expected to act differently due to this decision.

- **Conflicting loyalties:** Everyone belongs to groups other than this one. This can cause indecisive or impulsive decisions due to divided loyalties.

- **Interpersonal conflict:** Sometimes members/leaders feel it is more important to defeat or defend against other persons or factions in the group than it is to hear and weigh the contributions of those others. Don't treat contributions by their sources or "personalities"; treat them by their merits in relation to the problem your group is trying to solve.

Is your group stumped for new ideas? Do you do the same activities the same way year after year? Do the leaders and just a few others seem to do all the talking?

Brainstorming

Brainstorming may be just the technique to rejuvenate your organization and get everyone excited and involved. The purpose of brainstorming is to get out as many ideas as possible – the more you have to choose from, the better your final choice will be! You can use brainstorming for almost anything: program ideas, themes, slogans, publicity, group goals and problem solving. The rules for brainstorming are quite simple. Just be sure the group understands them and someone has the job of making sure they are followed.

1. Set a time limit–10 to 20 minutes, depending upon the size of your group and the complexity of the issue.

2. The best group size is 3-15 people. If you have more than 15, break into smaller groups and brainstorm simultaneously.

3. The question or issue must be one about which all participants can speak. Focus on only one issue at time.

4. Record all responses on a whiteboard, flip chart, or big sheets of newsprint so everyone can see them. Don't record the name of the person suggesting. Record only key words and phrases, not word for word.

Explain or Post the Following Rules:

1. Do not discuss ideas.

2. Do not criticize, praise or judge.

3. Be spontaneous–no hand-raising, just call out.

4. Repetitions are ok.

5. Quantity counts.

6. Build on each other's ideas–"hitch-hiking" or "piggy-backing" is encouraged.

7. Enjoy the silences-often the best ideas come out of them.

8. It is okay to be outrageous, even silly.

Make Good Use of Members' Creativity:

1. If several groups brainstormed the same idea, put the final lists on the wall and let everyone read each other's work.

2. Group ideas into related categories for review.

3. Decide which ideas are most promising and which can be eliminated; this can be done by putting pluses and minuses by items.

4. Rank those ideas which are most promising.

5. Select those with greatest potential and high-ranking priority for either implementation or refinement by committee or the group.

6. Follow-up. If the ideas are to be implemented successfully by the group or by committee, ask for updates on a regular basis.

7. Review and evaluate your ideas as they are being implemented. Make any changes deemed necessary by the group.

8. Be sure to utilize the ideas generated. It is extremely demoralizing for a group to invest its time, energy and creativity and have the idea disappear. Seeing your ideas come to fruition however, is extremely rewarding.

Delegating Responsibility

How can you help people in your organization prepare for future leadership roles and free up more time in your schedule so you can do other things? DELEGATION.

Delegation is the key to a successful organization. Sharing responsibilities keeps members interested and enthusiastic about the group. You might be reluctant to delegate because you want to make sure the job is done right, but you risk allowing members to feel unimportant if you do not share the responsibility of making the organization a success.

Good Reasons to Delegate:

1. The group benefits:
   - Members become more involved and committed.
   - More projects and activities are undertaken.
   - There is a greater chance that projects will be completed.
   - There are increased opportunities for members to develop leadership their skills.
   - More of a chance to fill leadership roles with qualified, experienced people.
   - The organization operates more smoothly.

2. The leaders benefit by:
   - Not being over-worked.
   - Gaining satisfaction as they see members grow and develop.
   - Acquiring more experience in executive and administrative functions.

Appropriate Times to Delegate:

- When there is a lot of work.
- When a member has particular qualifications for or interest in a task.
- When someone can benefit from the responsibility.
- When routine matters need more attention.

Do NOT Delegate when:

- The task is something no one wants to do.
- Someone is under- or over-qualified for the task.
- The work is your own specified responsibility.
- The area is an issue that deals with the personal feelings of another or is something that should be kept confidential.

There are Many Ways to Delegate, such as:

- Ask for volunteers by a show of hands or passing around a sign-up sheet.
- Appoint or suggest someone. Sometimes a member lacks self-confidence and will not volunteer; appointing him/her demonstrates your confidence in him/her.
- Assign the task to a committee. This takes the pressure off an individual and reinforces organizational structure.
- Trying to find the best fit of a person with the task is most effective. Try to spread the enjoyable and responsible tasks around, making your members feel more valuable.

Guidelines for Effective Delegation

1. Choose the appropriate people by interviewing prospects for each job and then placing your members carefully. Consider his/her availability, interests, experience, and capabilities.

2. Explain why he or she was selected for a particular task.

3. Discuss the task at hand. Discuss ideas and mutually set goals and objectives.

4. Whenever possible, give those who will be responsible for carrying out a program a voice in the decision-making process.

5. Clearly define responsibilities delegated to each person. Explain what is to be expected of the person assigned to the task at the beginning of your delegation. Be sure an agreement is reached on areas where the person may function freely and where he or she should conform to specific guidelines. Everyone accomplishes tasks differently, so allow for individuals to get things done in their own way as long as the job is done in a timely manner.

6. Implement a communication plan so you will know when your members need help. Make sure your members understand that you are willing to assist, but must first be told when and how you can help. Give accurate and honest feedback. People want and deserve to know how they are doing—this is both an opportunity for allowing satisfaction and encouraging growth. Allow for risk-taking and mistakes.

7. Support your officers and committee chairs by sharing information, knowledge and plans with them. It is incredible how many errors are made simply due to a lack of

information and a steady flow of communication between leaders and group members. Share failures as well as successes.

8. Step back. Most responsible people do not appreciate someone looking over their shoulder or taking back parts of their assignment before they receive a chance to finish it. As a leader, it can be hard for you to "let go;" most likely, you like being the person that gets the work done, but let them do the job!

9. Follow up. Check periodically to see if people have questions regarding how a project is supposed to be completed. This will allow you to observe how the individual is progressing on the task. There is a fine line between following-up and controlling.

10. Evaluation. You must not overlook the need to evaluate to the extent to which actions conformed to plans, if the plans went well or if the original plans were appropriate and worthwhile. Use appropriate feedback techniques. One of your most important roles as a leader is to help your members to learn and grow through both their successes and their failures. Your members are your greatest resource, let them create and turn their creativity into action!

Working with Student Committees/Volunteers

Many times students volunteer to help with programs or special committees. These students are unique in that they are volunteering their time for the benefits of others, and they should be treated accordingly. Listed below are some important tips for working with volunteers.

- *Give each individual a specific responsibility.*

- *Encourage ideas from members and utilize them or parts of them.*

- *Ask opinions of various students and if needed, shape their ideas but don't force yours.*

- *Explain aspects of a specific program so all will be clear on what groundwork has taken/is taking place.*

- *Ask for evaluations of each program and use the criticism to improve the next program. If possible, mention who the suggestion came from.*

- *Delegate certain tasks according to individual interests. If a member has a "thing", give him/her tasks related to that specific area.*

- *Utilize special gifts of each member. Using their talents will make them feel more appreciated and important.*

- *Utilize the contacts of each individual member.*

- *Be enthusiastic about each program. Enthusiasm is contageous! Chances are, if you look like you're enjoying an aspect of programming, others will want to get in on the action.*

- *Look for people who habitually sit around and look lonely and ask them to do small things. Find ways to stimulate their interest. If feasible, have them bring friends along to help on projects.*

- *Congratulate members when they successfully complete a major task. Positive feedback is vital to student involvement.*

- *Allow them full responsibility -- the praise for a job well done, and an opportunity to fail.*

- *Don't overwork the same students just because they are willing.*

- *Encourage creativity!*

- *Channel enthusiasm in positive directions.*

- *Don't only ask your friends to help; not only will you lose friends, you'll create the idea that those are the only people you are willing to involve.*

- *Give each person a task he/she can complete but is still challenged by.*

Remember, these students are not obligated to help you. Treat them with respect and appreciation. Let them know their efforts are necessary and how they benefit the group or program!

Successful Techniques for Group Negotiations

A negotiation is a discussion intended to produce an agreement. Negotiating is a crucial step in your organization's decision-making process and is a great way to solve problems. A conflict resolved through negotiation keeps your members happy and helps your organization run more efficiently. Here are some tips for successful negotiation:

Listen
First, listen to those with whom you are negotiating. Hear their point of view and try not to immediately consider their ideas to be wrong. Try to keep an open mind; your ideas are not

the only great ideas! Take turns with others in your organization voicing your opinions and remember to let them finish expressing their ideas fully. As you listen, make sure the speaker knows you are paying attention. Making small gestures, such as nodding and maintaining eye contact are some ways to show others that you are interested in what they are saying. Occasionally sum up what you are hearing to make sure you clearly understand the speaker.

Clearly Define Goals
Express your views plainly and clearly so that others may understand what you are trying to say. Some ways to help get your point across are visuals. Handouts are a great way to reiterate your points and it helps them make a decision on what is best for your organization.

Understand the Problem
Being a leader requires you to be knowledgeable in many things related to your organization. Be aware of what problem you are trying to resolve, and be open to the many possible solutions. By being on top of problems in your organization, you will be able to run it more efficiently. By resolving problems in a timely manner, you help prevent future problems while keeping those in your organization happy.

Ask Questions
If you find yourself in a situation where you do not understand another's argument, do not be afraid to ask questions. It is important to understand thoroughly all points being made. It is also important to understand the reasoning behind them. When people are not being concise, it is your responsibility to recognize this and address the matter. Questioning will not only help you to better understand the issue, but it will also help other members of your organization understand as well.

Consider Alternatives
Be conscious of the fact that there are several ways to solve a situation, and that they all are viable options. Listen to those in your organization and keep an open mind. If your group finds itself in a situation where it seems impossible to find a viable solution to a problem, brainstorm alternatives. A brainstorming activity is a perfect way to get great ideas fast.

Solutions
When trying to reach an agreement on an issue, it is best if the group comes to a consensus. It is important to have the full support of the members of your organization. If not, then the problem is not resolved and alternative solutions should be addressed. Everyone should give their appropriate input and influence the final decision. With successful negotiating, problems in your organization will be resolved and it will run more effectively.

When Delegation Fails

On a regular basis, student leaders come to the Student Activities Office to discuss the problems they are having with their members. What they haven't asked themselves is this – why are they having so much trouble with getting their members to follow through? Why won't they do what they were assigned to do? The bottom-line is simple! There was a breakdown in the way this task was delegated. Take some time to reflect on your specific situation and see if any of the concepts below are pertinent to your group.

Why Members Will Not Accept Delegation

Members do not accept delegation because:

- They find it is easier to ask the chairperson, officer, etc., than to make a decision by themselves.
- They do not understand their own authority level; therefore, they are indecisive.
- They fear criticism for mistakes.
- They lack the resources and necessary information to do a job.
- They lack self-confidence.
- They feel the incentives (results) are inadequate to motivate them.

Why Delegation Fails

Delegation fails for one of three main reasons. Each reason seems obvious, but individuals should examine their own process of delegation and evaluate its effectiveness. If it seems not to be working, maybe one of the causes below is the reason:

1. The process is incomplete. Responsibilities for results have been distributed without granting sufficient authority or creating a relationship of accountability.
2. The chairperson, officer, etc., refuses - deliberately or unconsciously - to delegate. The obstacles to delegation are never overcome.
3. Delegation is blocked by incomplete or ineffective communications. Many times the chairperson, officer, etc. goes through the process and the activities associated with delegation without the member realizing there was any attempt to delegate. Thus, the chairperson, etc., acts and proceeds as if delegation has occurred, with the member finding out when deadlines come near. This is the most difficult reason to identify and can be eliminated by the job clarification process.

Effective Meetings Checklist

Do you find yourself wondering how well meetings went? You can review these points with the other officers and members to evaluate how effective your meetings are.

The meeting was well planned if:
- Members received advanced notification and a prepared agenda.
- Officers and committees made pertinent reports.
- The meeting room was set up and ready.

The meeting was well organized if:
- The meeting began on time.
- Guests were introduced and welcomed.
- Agendas were available for all members and the purpose for meeting was clear.
- There was a transition from the last meeting.
- The group discussed one topic at a time and one person spoke at a time.
- Discussion remained relevant to the topic at hand.
- The chairperson summarized the main points of the discussion.
- The meeting moved along at an efficient and workable pace.
- The chairperson made committee assignments complete and clear.
- Plans for the next meeting were announced.
- The meeting remained in-tune with the schedule/minutes.

Participation remained effective if members:
- Participated in discussions and/or voting and asked informative questions.
- Considered the pros and cons of all issues.
- Made suggestions to committees and evenly distributed responsibilities.
- Participated in planning the agenda for the next meeting.

Your group had a valuable meeting if:
- Your group made significant progress towards the group's desired goals.
- Members effectively received dispersed information.

Your group had a positive meeting if:
- The meeting had high attendance and attendees arrived on time.
- The group achieved degree of humor and level of comfort throughout the meeting.
- Members and officers assisted one another when needed.
- There remained an atmosphere of free expression.

Minutes and Record-Keeping

The position of Secretary of your organization is not a job to take lightly. Reflect on the following criteria when considering who will best fulfill this role:

- Is the person reliable; does he or she keep appointments?
- Is the person well-organized; does he or she complete tasks in a timely manner?
- Is the person a good listener; is he or she able to be objective and hear both sides of an issue?
- Is this person on top of what is going on? Is he or she able to approximately weed out the trivial information and record only the important facts for record?

As you can see, the role of a Secretary is more than just taking minutes. The Secretary is, in effect, also the historian. What he or she records will be referred to by members of the organization as a reminder of finished and unfinished business, what needs follow-up, and what actions were taken. It will also be kept for future members to read in order to gain an understanding of where the organization has been. Many organizations make it the Secretary's responsibility to notify the membership about upcoming meetings: time, date, location, as well as any important items to be discussed.

The Secretary should be present at all meetings. If he or she is unable to attend, a substitute, preferably with the characteristics defined earlier, needs to be appointed. It is helpful for the Secretary to prepare him or herself before each meeting. A Secretary should be sure to read over the minutes of previous meetings, review the agenda and any attached documents. The organization can agree upon a standard format for minutes and can fill in important points of discussion, etc. as they occur.

If your organization has a structure that includes committees, whether ad hoc or standing, there should always be a Secretary present to record accurately what transpired during committee meetings. It is not necessary to transcribe absolutely everything word for word. However, it is necessary to take complete notes. Motions and resolutions do need to be taken verbatim and should be read back during the meeting to make sure they have been accurately recorded.

There are several ways to take meeting minutes and each organization needs to choose the most appropriate method for them. One option is to record a summary of debates, agreements and disagreements with a succinct explanation of the character of each. Another method is to take action minutes when decisions are reached and responsibilities are assigned. In either of these cases, make note of the following:

- The names of the people proposing any action or stating an opinion of a motion.

- Motions, resolutions, amendments, decisions and/or conclusions.
- The name of the person that seconded the motion.
- Whether a motion was withdrawn and what assignments were made (all of these should be written verbatim).

It is often both helpful for taking minutes and important for those attending the meeting if the chair or the Secretary summarizes decisions that are reached. This person should be careful in clarifying the points of the greatest controversy. It is the Secretary's responsibility to gain the attention of the president or chairperson and to ask questions if unsure about the subject being discussed. A Secretary should not wait until the meeting has been adjourned to get a clarification; individuals can lose their perspective, issues can become less important and one's memory can alter what actually occurred. Also, immediately after the meeting, the Secretary should go over his or her notes while everything is still fresh, checking for the following information:

- Type of meeting (executive, standing committee, etc.).
- Date, time and place.
- List of all attendees and absentees.
- Time of call to order.
- Approval of and/or amendments to previous meeting minutes.
- Record of reports from standing and special committees.
- General matters.
- Record of proposals, resolutions, motions, seconds, final disposition and a summary of the discussion and records of votes.
- Time of Adjournment.
- Nomination of submission and transcriber's name.

Once the minutes have been transcribed into a draft form, they should be submitted to the Chair for review and/or correction. When they are returned, they should be prepared in a formal form for final approval at the next meeting. These minutes should be sent out to all members within 3 or 4 days of the meeting, which will allow members time to read the minutes for accuracy before the next meeting and while the previous meeting is still fresh in their minds.

Make sure you keep a copy of all minutes and any other records for your Transition Notebook.

Time Management

As a college student it is often difficult to balance your everyday activities. From school work to extracurricular activities to social life, managing your time wisely and effectively is arduous. As a leader, you must manage your time as well as advise other members of your organization on effective time management skills. With effective time management, you will feel less stressed and more organized. Time management is a crucial element of an effective leader. Great leaders have employed several different techniques to use their time in order to become more efficient with their work. The following represents some of the most important.

Make a "To Do" List
A key factor in managing your time is remembering your appointments and what needs to be done. Planners, calendars, lists, and notes are just a few examples of helpful instruments that will aid you in creating your personal organizational style. Make sure your list is reasonable, and the completion of all tasks is obtainable

Set Priorities
Now that you know what needs to be done, decide which work is important and what is less important. While making your list, put tasks down in order and "knock out" what is most important to you first. You may want to rank each item:
- A for "HIGHEST Priority" – items that must be done today.
- B for "High Priority" – items that must be done in the next 2-3 days.
- C for "Lower Priority" or ongoing projects – items that are important but not pressing.

Cross items off as you go along. The satisfaction you will receive from viewing your accomplishments will motivate you to continue in the same manner.

Use Your Time Wisely
If you decide to use lists to help with organization, be mindful of your scheduling. Make sure event times do not overlap. Be punctual when attending an event or completing your work. If you find that you are unable to complete all your tasks, ask yourself, "Can I do this on another day?" If time permits, rescheduling appointments and tasks may help create space in your day. Also, omitting unimportant events is a great way to reduce your work load and eliminate some stress. Do, however, notify people involved if you are not going to be able to attend an appointment or scheduled event.

Don't Feel Like it?
You may possibly find yourself in a situation where you are unmotivated to get your work done. Here are some helpful tips to get yourself back on track:

- Break down tasks into smaller tasks. Not only will it help the obstacle become manageable, but it will also give you a sense of accomplishment.
- Reward yourself for reaching goals. Even something small like a quick walk or a short rest period are good ways to get yourself motivated.

You Are Not a Super Human

Remember, keep your schedule reasonable and only do what you can handle. It is fine to postpone tasks that you feel you are unable to handle at this time. If you feel overwhelmed, ask others to help you. Delegate! Through cooperation, your tasks will be completed and your organization will run more efficiently. Time management will enable you to be a more organized leader ready to handle almost any situation and lead your group.

Effective Leadership Transition

Your year as an officer is coming to an end and new officers are being selected. How do you leave your position gracefully? How do you ensure that the new officers are ready to continue to provide your organization with strong leadership?

A thorough leadership transition plan has several benefits:
- Providing for transfer of significant organizational knowledge.
- Minimizing the confusion of leadership changeover.
- Giving outgoing leaders a sense of closure.
- Utilizing the valuable contributions of experienced leaders.
- Helping the incoming leaders absorb the special expertise of the outgoing leadership.
- Increasing the knowledge and confidence of the new leadership.
- Minimizing the loss of momentum and accomplishments for the group during this period.

When Do You Start? Early!
Begin to identify emerging leaders early in the year. Encourage these potential leaders through personal contact; help them to develop skills by delegating responsibility, sharing the personal benefits of leadership, clarifying job responsibilities, letting them know that transition will be orderly and thorough, and last, modeling an open, encouraging leadership style.

When new officers have been elected, orient them together as a group with all of the outgoing officers. This process provides the new leaders with an opportunity to understand each other's roles and to start building their leadership team. Be sure to transfer the knowledge and information necessary for them to function well. An organizational history and flow-chart might be helpful. Take time to organize any files or notebooks so they may quickly access information.

What Do You Need To Transfer?
Think back to your first weeks. What could you have used to do your job better? Some suggestions include:
- Awareness of challenges, helpful ideas, procedures and recommendations.
- Written documents containing:
    - Traditions.
    - Records about completed projects.

- · Continuing projects and concerns.
- · Ideas for future projects and activities.
- Personal and organizational files.
- Instructions for use of equipment, facilities, or suppliers, and any office procedures.
- Introduction to personnel (advisors, administrators, contacts, etc.).
- A complete record of the organization's structure, goals and accomplishments:
  - · Constitution and by-laws.
  - · Organizational goals and objectives for the previous year(s).
  - · Job descriptions/role clarifications.
  - · Status reports on ongoing projects.
  - · Evaluations of previous projects and programs.
  - · Previous minutes and reports.
  - · Resources/contacts lists with addresses and phone numbers.
  - · Student Activities and Leadership handouts.
  - · Organizational Handbook.
  - · Finance Committee Requests/Budget.
  - · Mailing/E-mail Lists.

An effective leader knows his/her job is not done until the future of the organization is secure and arranges for a smooth turn-over of responsibility to new leadership.

Using a Transition Notebook

Think back to your first few days working on your project or in your position. You probably had many questions and no one to turn to. Take the responsibility now by preparing a transition notebook to make sure this does not happen to the person who takes your place next year.

A transition notebook can be shared during meetings with your successor. It should cover all aspects of your responsibilities and how those tasks fit into the organization's big picture. Recommend that your successor file historical documents in the notebook, such as meeting minutes. This way, the notebook can be used as a working tool rather than something to be completed at the end of the year (usually during finals!). Each organization is very different so feel free to add and delete topics. Your successor will thank you throughout the year!

A good transition notebook includes several elements:

Introduction
- Table of contents
- Contact sheet with listing of the new leadership and returning membership

- Letter from advisor

Welcome the new leaders
- Role and responsibilities of the group leaders
- How to contact him or her

Historical documents
- Constitution
- Mission Statement
- Goals and objectives
- History of organization and committees and programs
- Job description for each leader
- Organizational flowchart
- Information on officer selection and timeline for the process
- Information on officer recruitment and timeline

Evaluation
- Completed evaluation with detailed recommendations
- Two blank evaluations which can be written during the term

Progress Reports
- Completed progress reports
- Blank progress reports (to be completed throughout the year) with guidelines.
- A progress report provides the "working draft" for most of the transition notebook. It should provide the leader with an opportunity to write down what is new or different about the organization, what has been improved on throughout the year, what changes are in progress, group accomplishments, etc.

General Organizational Information
- Demographics from current year (number of men versus women, number of freshmen, sophomores, juniors, and seniors, etc.)
- Letter from the former coordinator to the new coordinator. This should include advice, what was experienced during his or her term, what was improved upon this year, things to know when getting started in this position, a prioritization of the tasks for the office, etc.
- A blank "Bright Ideas" sheet to be used throughout the year. "Bright Ideas" are ideas that can help move the organization forward.
- Current goals
- Blank goals sheet

- Detailed timeline
- A copy of the budget requests submitted to the Finance Committee
- A copy of all financial records listing expenditures as well as the revenue generated throughout the year
- Any other information pertinent to the position

Training Information
- Agendas and handouts from past training retreats or meetings
- Information on the "how to's" of the organization: such as publicity, financial matters, etc.

Organizational Information
- Calendar of events
- Meeting agendas and minutes
- Resources
- Instructions on how to sign on to your organization's electronic mail/voice mail, web pages, etc.

Resources for Faculty/Staff Advisors

Thank You!

Thank you for being willing to serve as a faculty/staff advisor for a student organization here at the University of Mary Washington. By taking an active role in campus life outside the classroom, you are showing that you are deeply committed to students, the University, and its principles of community living and higher learning.

Outside of the classroom, clubs and organizations play an essential role in a student's learning experience at Mary Washington. They offer students the chance to try something new, meet new people they otherwise would never know, and give them leadership roles they would not find elsewhere.

While being a faculty advisor can be time-consuming, the position is also rewarding. It is an honor to be asked by students to be their organization's faculty advisor. They respect and trust you, and view you as someone they would like to spend time with, outside of the classroom.

This section will provide you with information and suggestions that will help you create and maintain a good advisor/organization relationship in the coming year(s). Please note that the role of the advisor varies greatly from organization to organization, depending on its structure, activities, and quality of student leadership. Therefore, the contents of this section are mainly suggestions, and it is important for you to sit down with the student organization leaders and discuss this Handbook and your role. This guide does not convey any rights or obligations between the University of Mary Washington and any organization or individual, but merely sets forth guidelines and procedures established for faculty advisors. The following sections provide general expectations for student organizations and faculty advisors.

Thank you again, and we hope you have a great year!

Establishing Boundaries and Expectations

Student organizations are designed to serve the interests of the students, to explore new subjects and activities on their own terms. Some organizations require more involvement on the part of an advisor, while others can more or less run themselves with little or no advising. This depends greatly on the student leadership within an organization, how the organization has operated in the past, and the ambition and level of activity of the organization and its programs.

Regardless of how much direct involvement a club will require from its advisor, set boundaries and expectations for both the faculty advisor and the student organization before the start of a new semester so that when situations arise, each party knows its role. The following are acceptable, though not necessarily mandatory, expectations for faculty advisors and student organizations.

Expectations and Responsibilities of Faculty Advisors

- Familiarize yourself with the other sections of the Student Organization Policy Handbook and with your organization's constitution.

- Be a "sounding board" for your organization to bounce new ideas off of. Give the students honest feedback and encourage them to try something different.

- Offer new perspectives, point out new directions, and introduce new ideas. Whether they are working on projects, events, or just brainstorming ideas, give students any suggestions for general advancement of the organization.

- Intervene in conflicts between group members and/or officers when needed. Being slightly outside the organization gives you the "third-party" advantage of being removed from most conflicts and able to objectively look out for the good of the group as a whole. If possible, work out problems in small groups before involving the whole organization.

- Serve as mediator during an organizational crisis (i.e., internal conflicts between members, student death, and accident). Remain in close contact with a designated member of the group who is working with the media and the public, if appropriate.

- Provide continuity and stability as student leadership changes. Encourage leaders of your organization to think about the future of the club, after they graduate, and have them gather useful information about the club (its constitution, resources, traditions, etc.) to pass on to the next leaders. Be knowledgeable about both the history of the organization and what its future plans entail.

- Work with the student organization to set obtainable goals for that organization. Think about agendas for both short-term and long-term planning purposes. Since you will be at Mary Washington after these students leave, you can help ensure the long-term goals for an organization are met. Give guidance to the club if revisions are necessary to its constitution or the responsibilities of its officers.

- Provide your group with connections on campus. You are probably more familiar with Mary Washington and the surrounding Fredericksburg community than most of your students are, bearing in mind that most of them have only been here for a

short period of time. Be the organization's primary resource for where to go, what to do, and whom to talk to.

- Insist that members operate within the framework of Mary Washington policies. While you will be familiar with the policies that impact your organization's decisions and programs, make sure the students also recognize the policies of the University and abide by them when you are not available.

- Attend events and get to know members. Although you have a busy schedule of your own, it is important that you attend as many meetings for the organization as possible and be present at all public events scheduled by the organization.

- Be aware of all travel procedures. Each advisor must know and have itinerary and contact numbers for all members while traveling.

- Be aware and review all contracts that your organization enters into. Remember: The Director of Student Activities is the only one authorized to sign on behalf of the University for all clubs and organizations.

- Represent the group to the administration and help create a better understanding of the organization and its operations.

Responsibilities of Student Organization Leaders

- Discuss among chairs or officers the expectations your organization has for your Faculty Advisor.

- Meet with your Faculty Advisor as soon as possible each year to discuss with him/her your expectations and his/her expectations in the position.

- Regularly consult with your Faculty Advisor throughout the year and keep him/her updated on finances and general club status.

- Consult with your Faculty Advisor before undertaking any changes in structure or policies of the organization, or before undertaking any major projects.

- Accept guidance and direction from your Faculty Advisor.

- At the end of the year, meet with your Faculty Advisor to conduct an annual evaluation of both the advisor and the organization. Also, provide your advisor with sufficient information to ensure a successful transition to new leadership for the club next year.

- Members have a right to voice their disagreements with the decisions of the advisor, and if serious problems arise with the advisor, organizations have the right to find a new Faculty Advisor.

All student leaders need to remember—this is a student organization. Ultimately, success or failure of a group or project lies with the organization as a whole, not the advisor.

Cautions to Faculty Advisors

- Help students find a balance between their academics and their co-curricular activities.
- The advisor is an integral part of the organization but not a member.
- The advisor has the right to disagree with decisions of the organization.
- The advisor should work with the group, but not direct its activities.

The degree of faculty advisor involvement varies greatly from organization to organization and from year to year. Talk with the organization about what their expectations for you are, what their needs are, and have a clear understanding of your relationship to the organization before each year begins.

Remember—this is a *student* organization. Ultimately, success or failure of a group or project lies with the organization as a whole, not the advisor.

Club Sport Advisors

Club sport advisors have additional responsibilities, as they may act in the capacity of a team coach. Please realize that there is a large time commitment involved when advising a club sport. Not only are you expected to make sure the team abides by University, State and Federal policies, you also have the added responsibility of knowing all the rules and regulation for your club's sport. The staffs in Campus Recreation and OSACS are here to help you. Feel free to contact us as you have a question, need information, or help with a process.

Campus Recreation has created a new handbook for Sports Clubs. Be sure to contact their office for further guidance.

Student Leadership Transition

You and the students have put a lot of work into your organization over the course of the year, but what happens to the club when your student leaders graduate or move on?

From the beginning of the year onward, encourage students to keep track of what they have been working on. Please refer to the Leadership Transition and Transition Notebook

sections in this handbook to help you. In addition, it would be helpful if you could keep in contact with past student leaders from your organization, in case questions arise or the new student leaders want additional guidance.

Evaluations

Every faculty member is familiar with course evaluations that students fill out each semester. You might find it helpful to do similar end-of-the-year evaluations with your student organization leaders to discuss what worked and what did not work. As a starting point, discuss with the club leadership their leadership styles, club events, and general performance, and ask them for feedback regarding your advising techniques.

Resigning

We understand there may come a time when you no longer are able to continue in your role as Faculty Advisor. Whether you are leaving the University, have no free time, have disagreements with student leaders about the direction of the organization, or are simply losing interest, please resign if you feel you should. You don't want to leave your organization stranded, so once you have made your decision, talk with the student leaders and help them, if you can, in their search for a new advisor. All organizations are required to have an advisor, so your organization will be placed in a suspended status until a new advisor is found. Please contact SAE so that we can also work with the organization through this process.

Student Organization / Faculty Advisor Relationship Agreement

The "Student Organization / Faculty Advisor Relationship Agreement" is found on the next page. One should be completed for every student organization. Its terms can be modified to include expectations and guidelines that are important to you and your organization.

Please read the rest of this section and then fill out the "Student Organization / Faculty Advisor Relationship Agreement" with the concrete expectations and boundaries you and your organization agree upon. Have the club and the sponsor each keep a copy for future reference.

University of Mary Washington
Student Organization / Faculty Advisor Relationship Agreement

As the **officers** of _____, we enter into this relationship with our faculty advisor(s) with the following understanding:

a. We have read and understand the Student Organization Policy Handbook. We agree to maintain the standards and expectations set forth by the University.

b. We understand that hazing is against University policy and is a violation of Virginia State Law. We agree to not participate in any activities that could be considered hazing.

c. We agree to abide by and report any violations of the University's alcohol or drug policy.

d. We agree to keep you informed of all business conducted by the organization.

_____   _____
President/Date   Vice-President/Date

As the **advisor** of _____, I agree to accept the following responsibilities:

a. I have read the Student Organization Policy Handbook, and I certify that I meet the qualifications for this position and I agree to provide the services listed.

b. I understand that as the official faculty advisor as required by the University that I cannot also act in the capacity of financial advisor, therefore releasing myself and the University from all financial obligations incurred by the organization.

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_____
Advisor/Date

_____   _____
Campus Mailing Address   Telephone
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