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Advisor Handbook  
Center for Student Involvement  
2017 - 2018

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## Benefits of Advising

There are many benefits associated with becoming an advisor to a student organization. Here are some:

- The satisfaction of seeing and helping students learn and develop new skills.
- Watching a disparate group come together to share common interests and work toward common goals and an understanding of differences.
- Developing a personal relationship with students.
- Furthering personal goals or interests by choosing to work with an organization that reflects one's interests.
- Sharing one's knowledge with others.

## ADVISOR ROLES

Every student club/organization must have a faculty or staff advisor to become a recognized club at Eastern Oregon University. The primary role of the advisor is to actively serve as a resource person for the club/organization. Advisors should be available to provide advice and counsel student clubs/organizations by asking questions, encouraging students in their thinking process and encouraging additional learning opportunities and challenging the organization to go above and beyond the status quo. Furthermore, advisors provide continuity to a club/organization as they can pass along valuable information regarding the history of the organization and their past accomplishments. Active advisors can improve the effectiveness of a club/organization while also providing positive leadership development for students.

An advisor can play multiple roles within the club/organization. The following are roles and/or broad categories that advisors often fall under:

- **Leadership growth and development:** The advisor regularly assists students in the development of lifelong and necessary skills relevant to learning such as time management, problem-solving, delegation, and communication.
- **Organizational liaison:** The advisor is able to explain university policies and connect students to the appropriate offices and individuals for assistance.
- **Program assistance and organizational purpose:** The advisor assists students in the development of activities, events and projects by maintaining active recognition among the campus community. The advisor encourages members to find opportunities to meet the organization's goals on a regular basis.

The role of the advisor can vary from one club/organization to another, based on the club/organization's needs and goals. Frequent communication should occur between the advisor and the student organization to determine what that role will look like during the year. It is important to remember and remind the students involved in the club/organization, that the role of an advisor is not to be 'just a signature' in order to receive recognition.

## Advising Expectations

The Center for Student Involvement (CSI) requires all registered student club/organizations to secure and maintain an advisor who is currently a full-time faculty or administrative staff member at Eastern Oregon

University. CSI believes that student club/organization advisors are integral to the success of the organization and the development of its student leaders.

**Advisor Expectations:**

The Center for Student Involvement (CSI) requires all registered student club/organizations to secure and maintain an advisor who is currently a full-time faculty or administrative staff member at Eastern Oregon University. CSI believes that student club/organization advisors are integral to the success of the organization and the development of its student leaders. In order to serve as an advisor, faculty or staff agrees to assist in:

- Assisting the club/organization's officers by submitting the Intent To Be Active Form.
- Verify and sign all forms for activities with appropriate university departments granting permission.
- Verify the club/organization's information on all funding requests.
- Verify the club/organizations financial transactions.
- Explain university policies when relevant.
- Meet individually with club/organization president on a regular basis.
- Attend officer and organization meetings. Take an active role in formulating the club/organization's goals.
- Help student leaders prepare an annual budget (if organization, budgets are submitted every January to the Student Fee Committee).
- Assist in preparing and be copied in any correspondence being sent out.
- Assist in the decision-making process for the development of the club or organization by providing sound feedback.
- Assist in any manner that may result in a conflict, which would include problem-solving.
- Assist in planning events on and off campus.

## What Makes A Good Advisor?

First and foremost remember that you are a role model for the students you advise. Believe in those students and help them realize their full potential. By believing in them and their accomplishments they will learn to believe in themselves and strive for their best. Remember to continually give them positive and constructive feedback. This type of evaluation will help them learn and grow as student leaders.

As they grow provide them with an environment that promotes positivity and success. Take the time to get to know the students you advise as individuals, not just as students in a club/organization. Share your experiences and thoughts with them, while finding out their own thoughts and experiences. The time you spend with your students will leave a long-lasting impression on them as they graduate and begin their own professional careers. Looking back on their experiences they will remember the role model who helped them become who they are and led them down the right path.

It is also important to bear in mind that the job of advisor is not always an easy one. At times you may have to make a difficult decision or take an action which is not popular with the organization. It is important to realize that your first responsibility is to the health and well-being of the students and to uphold campus and community policies and regulations. It may be necessary on occasion to use your authority to ensure that you meet these responsibilities.

### Remember:

- Don't be the leader or "run" the meeting.
- Don't let personal goals interfere with or influence group decisions, activities or goals.
- Don't be afraid to let the group try new ideas.
- Don't become such an advocate that you lose objectivity
- Don't allow the organization to become a one-person organization.
- Don't be either laissez-faire or autocratic.
- Don't assume the group handles everything well and doesn't need you.
- Don't assume the organization's attitudes, needs and personalities will remain the same from year to year.

### Questions You May Want to Ask the Organization

- How much involvement is expected or needed?
- How often does the group meet?
- How many major activities does the group plan per term?
- How experienced are the student leaders?
- How do your skills match the needs of the organization?
- What are some of the problem areas that your organization specifically needs advisory assistance in dealing with? Ask for past examples.
- What are some of the ways the advisor can be more helpful to the group?
- Will the advisor be a silent observer at meetings or an active participant?
- Should you interrupt during meetings if you think the group is getting off track? How? When?
- If things get unruly, should you interrupt or remain silent?
- Is the advisor expected to give feedback? How? When?
- Are there areas of the organization that are "hands off" to the advisor?

## Troubleshooting

The following lists are provided so that an advisor may have a better idea of the types of problems they may face with their organization. This list is not all inclusive, but may serve as a guide for the Advisor.

### Leadership Problems

- The leader does not consult with the organization before making significant decisions.
- The leader appears to lack self-confidence, is unassertive, and lacks interest in the organization.
- A rivalry exists between the leaders in the organization.
- The leader has work overload, and too many time-conflicts.

### Membership Problems

- Low attendance at meetings.
- Members have low satisfaction and morale, are bored, do not communicate well, feel left out or are apathetic.
- Members compete for attention.
- An individual member's goals differ from those of the organization.
- There exists a lack of trust among members.
- Programs fail.
- There is a lack of ideas.

### Organizational Problems

- Meetings are disorganized.
- Meetings are too long.
- The organization suffers from financial problems.
- There is no continuity from one year to the next.
- The organization has no "plan of action."

### Inner-organization Problems

- Disagreement between an organization and other student organizations.
- Disagreement with institutional policies and procedures.

### Advisor Problems

- Organization members avoid the advisor.
- Organization members do not pay attention to advisor's advice.
- The advisor is overwhelmed by their responsibility.

## Advising Styles and Skills

Situational advising allows you to change your advising style to match the development needs of the individual or organization you advise. Your advising style is the way you advise when you work with someone. It is how you conduct yourself, over time, when you are trying to influence the performance of others.

## Advising Styles

You will need to vary these based on your assessment of the students/groups readiness level. Many times, advisors may struggle with students because they believe that they need a higher level of interaction or direction when the student is actually able to accept more of a delegating style and vice versa.

- *Directing*: The advisor provides specific instructions and closely supervises task accomplishments. Use this style with students/groups that are at a low level of readiness.
- *Coaching*: The advisor continues to direct and closely supervise task accomplishment, but also explains decisions, solicits suggestions, and supports progress. Use this style with groups that have a few leaders that are at a higher readiness level who will need your support with the rest of the group to get things accomplished.
- *Supporting*: The advisor facilitates and supports the efforts toward task accomplishments and shares responsibilities for decision making with the students. Use this style with students/groups that are just starting to understand the concepts that will lead to success - the group is just starting to “get it”.
- *Delegating*: The advisor empowers the students to conduct their own decision making, problem solving, and delegating. Use this style with students/groups that are at a high level of readiness.

## Advising Skills

- *Flexibility*: You must be able to move from one style to another in order to meet the needs of the different types of students and multiple circumstances you will encounter.
- *Diagnosis*: You have to learn how to diagnose the needs of the students you advise. Determining what is needed as opposed to what is wanted is sometimes a difficult task. It is also important to note that what is needed is not always the thing that will get the most positive response - it is what will lead the student through a problem, set the standard for the future, or help to teach the student a valuable life lesson.
- *Contracting*: You have to learn how to come to some agreements with students. It can be helpful to work together to reach an agreement as to which advising style they seek from you. This is a valuable lesson for assisting students with understanding the rules of engagement and interaction that will be carried forth as they mature.

\* See Appendix A for comparison between advisor to student leader role.

## **Liability and Risk Reduction**

As an advisor of a student organization you are the university's representative regarding the organization's activities. As such, you are expected to give reasonable and sound advice to your organization about such things as programs, use of facilities, and operational procedures. If you have reason to question an action taken by the organization express your concern directly to the organization in writing including the date, a suggested alternative to the questionable action, a warning, etc.

It is important to remember that, in general, while we need to be concerned about liability we can seriously damage the educational process by being paranoid about it. Just as there is no specific statement that explains faculty liability for every possible classroom incident, there is none that covers all the possible situations student organizations might encounter. If you have concerns about a situation unique to your organization or to a specific event sponsored by the

organization you advise, please contact the Center for Student Involvement, who is knowledgeable about liability and risk management.

Although there is no way to completely eliminate risk and legal liability associated with a program or event there are ways to reduce risk and provide a safer environment for program participants.

Organizations must work with the Center for Student Involvement to determine the risk level involved with your event. Remember that each event may be unique and change from time to time depending on the associated risks and the assessment. Participants are required to sign and submit the [Acknowledgement of Risk & Waiver of Liability](#) (found on the Center for Student Involvement website) form before your events and prior to any involvement or participation.

An Acknowledgement of Risk and Waiver of Liability form (also known as a waiver) is used to

- 1) Inform prospective participants of potential risks involved with an activity,
- 2) Allow an individual to voluntarily choose to incur risks, and
- 3) Secure an agreement from the individual to hold harmless the University.

This form should be used when

- 1) Minors are involved,
- 2) Activities with overnight travel,
- 3) Out of town trips,
- 4) High risk activities,
- 5) Elective or voluntary field trips,
- 6) Recreational activities and/or
- 7) Short distance travel.

EOU is pleased to have the assistance of many individuals who volunteer their services to help the University accomplish its mission. Departments/units are responsible for the oversight of all volunteer services and activities and for assessing the risks associated with volunteers. Volunteers are not covered by EOU insurance and **must** complete the [Conditions of Volunteer Service](#) form.

**NOTE:** Liability coverage is provided under Eastern Oregon University's insurance policy for student clubs and organizations. However, coverage is afforded at the discretion of the University and its insurers. Special events that incorporate higher risk for one-day activities must be purchased directly by the club or organization. Program organizers should understand that:

Students are NOT covered by Eastern Oregon University insurance while they are driving to and from events whether they are recognized or not. Approved high-risk activities, whether on or off-campus, may require the attendance of the club or organization advisor as deemed by the Center for Student Involvement based upon the risk assessment.

## Finance & Funding

One task a group faces is the development of a plan to be fiscally responsible. A budget can be a helpful method for keeping track of group funds.

### A Budget is:

- A tool for planning and controlling organizational funds.
- A formal written guideline describing your organization's future goals expressed in financial terms within a set period of time.
- A detailed statement of estimated income and expenses.
- A historical record of the organization's activities during a given periods.

### A Budget can:

- Help refine goals that reflect the realistic resource environment.
- Compel organization members to use funds efficiently and appropriately.
- Provide accurate information to adjust, analyze, and evaluate programs and activities.
- Aid in decision making.
- Provide a historical reference to be used for future planning.

**Note:** Proposed budgets for student-fee funded units are due at the beginning of each winter term.

### Developing a Budget

- Begin preparations a month or more before the close of the current year.
- Prepare an outline of the organization's planned activities for the coming year.
- Do careful studies, investigations and research of funding, cost and resources.
- Determine the available funds (carry over balance from previous year, cash on hand, funds in bank, interest, etc.)
- Estimate expected income and when it is expected to be available (dues, sales, etc.)
- Get price quotations on big expenditures, delegate responsibilities to members.
- Rank order by their relative importance, which activities/programs are the widest expenditures of funds.
- Choose programs to initiate; ask how much is available to allocate.
- Negotiate as necessary: eliminate or limit less essential expenditures.
- Revise, review, coordinate, cross-reference, and then assemble into a final budget; the budget must be flexible to anticipate conditions which might have been overlooked during planning.
- Vote to approve budget.
- Understand University policy on appropriate expenditure of funds.

### Managing the Budget

- Once approved, adapted and prepared, it should be monitored closely.
- Formulate procedures and policies needed to achieve objectives.
- Keep an accurate log of financial transactions (income/expenses); maintain in a record book (check and balance records regularly).
- Set up internal controls designed for safeguards and accurate accounting data.
- Assess budget regularly.

### *Frequently Asked Questions related to club/organization finances:*

**What is a Student-Fee Funded Unit?** A student-fee funded unit is an organization that is primarily funded by the Student Fee Committee with funds generated and supported by students. Currently, there are 20 student-fee funded organizations. Additionally, these units maintain regular interaction with University staff, rely on the University for additional funding, facilities, event planning as they have higher level of accountability to all students.

**How can a student club become a student-fee funded unit?** A club can seek to become a student-fee funded unit by submitting a proposal during the annual budget process, held in January. Documentation regarding the eligibility of becoming a student-fee funded unit can be found on the Associated Students of Eastern Oregon University website ([www.eou.edu/csi/aseou](http://www.eou.edu/csi/aseou)) under the Student Fee Committee Guidelines.

**How does funding for clubs & organizations work?**

Student clubs & organization can receive funds in a variety of ways – dues, fundraising and allocations from the Student Fee Committee, Senate Allocations and Vending Committee. Any monies earned must be put into a university club account. Club funds may be spent to support the stated purpose or mission of the club as voted by its members; not for individual personal gain. If the funds are from a student-fee allocation, the group may only spend those funds for the purpose they were requested. Each club or organization that receives funds or collects revenue has an established club account within the University. These funds must be deposited into the account and may be used for any reason as long as it supports the club and is approved by the membership.

**What are other sources for funding on campus for clubs?**

Clubs may request funding for specific functions by submitting an application request to the Vending Committee and/or Senate Allocations. Senate Allocations approves proposals every 4th and 8th week of each term (excluding summer) with proposals due the Friday prior to those specified weeks. Vending Committee meets on a regular basis as proposals are submitted. Keep in mind that there are different requirements/eligibility for each request. Clubs should review all documentation prior to submitting proposals. Senate Allocations proposal forms and Vending Committee forms can be found under the “Files” of the Center for Student Involvement website at [www.eou.edu/csi/files](http://www.eou.edu/csi/files).

**How do I receive a reimbursement?**

Individuals seeking reimbursement must submit the Payment Request form (found in “Files” at [www.eou.edu/csi/files](http://www.eou.edu/csi/files)). All requests must be submitted through the Center for Student Involvement with proper signatures on the form, matching the current Intent to Be Active form. Additionally, club officers cannot sign off on their own reimbursements and must have additional signatures. Each payment request form must have the original, itemized (listed items bought) receipts and/or invoice.

**How long will it take to get a reimbursement?**

Reimbursement requests take a minimum of 7 – 10 working days to process and checks are only cut on Wednesdays. Therefore, it is essential that all completed paperwork is immediately turned in to process reimbursement in a timely fashion.

**What do I do if I am given an invoice?**

Invoices must be turned into the Center for Student Involvement. Please make sure that listed on the invoice is the organization’s name, index code and member name/contact information to ensure appropriate delivery and payment. Invoices also need to have the Payment Request form (found in “Files” at

[www.eou.edu/csi/files](http://www.eou.edu/csi/files)) attached and properly filled out with all necessary signatures.

**Can my club/organization give donations to a service agency?**

Yes. Your club can make a donation to a service agency (or even another club) however organizations cannot make such donations as these funds are allocated for specific uses. In order to make donations, your club must organize a fund raiser, and then only the net profits may be used as donations. The donations must be strictly directed toward and collected by the service agency.

**Can my club pay for a dinner at a restaurant?**

As long as expenses are justifiable and have been budgeted the club account may pay for dinner. Please keep in mind that in order to be reimbursed, you must include an original, itemized receipt. The University will not reimburse for alcoholic beverages. For organizations, University funds when an official guest is being hosted by the institution and student(s) are serving as the host, up to two students may accompany the official guest for a meal and be reimbursed up to the per diem rates established in EOU and IFC policies.

**Can my club have a savings or checking account at a bank?**

No. Your club must have all funds coordinated through the University.

**When is the last day a student organization (SIF unit) can use their money allocated for the academic year?**

Receipts/invoices must be dated prior to June 30 and turned into the Center for Student Involvement prior to July 1. All goods must be received by June 30.

**How do we access our group account and/or spend funds?**

Groups may purchase clothing, travel, food (refreshments only unless granted prior approval), etc. (as long as it is related to the function of your club/organization and properly approved). However, before you spend, the Intent To Be Active Form must be on file with the Center for Student Involvement. Additionally, you should contact the Center to make sure that proper funds are available within your account prior to purchasing.

**What happens to the money left over in our accounts at the end of the year?**

Club funds are kept in their accounts and transferred over for use the following fiscal year. Organizations, however, are collected through the Student Fee Committee and either held within a reserve account or allocated through Carryover/Forgiveness (which occurs every Fall term)

# Fundraising

Many student organizations have big plans and excellent ideas for programs or services. However, few organizations have the finances to make these plans real. It is important for student organizations to have some kind of fundraising plans and to execute those fundraisers with the utmost professionalism, accountability, and legitimacy.

## Everyone is fundraising . . . How do you keep your organization ahead of the game?

- Think of unique opportunities that can make your organization stand out.
- Avoid the common and over-used methods . . . selling candy, bake sales, car wash, etc.
- Go outside the box.

## When considering an idea, don't forget:

- Effort and Participation
- Initial Investment of Money and Resources
- Your Environment

## Choosing a fundraiser:

- Choose something that relates to your organization's mission.
- In addition, find something that people can relate to or is needed within the campus community as well as externally.
- Let's make a deal: consider talking with businesses to see how your fundraiser can not only benefit you but also them.

## Successful steps toward planning your fundraiser:

- Set a goal.
- Ask for suggestions from your members. What do the members want to do? Brainstorm for ideas.
- Find out what has been done before. What worked? What didn't? Why? How can you improve?
- Check into local and state regulations. Check University policy. **Note:** Fundraisers must be preapproved through the Center for Student Involvement.
- Determine your market: college students, community, parents, etc.
- Advertise wisely.
- Let everyone know your expectations in advance and update on progress. Using a goal poster is a great idea; make sure that poster is displayed prominently.
- Recognize everyone involved in the planning and implementation of the fund raising project. Reward those who achieve. Make certificates, ribbons, or other type of small rewards for everyone who volunteered for the project.
- Thank supporters. Give your big donors some kind of tangible reminder of how they contributed to a good cause. Create and maintain good will with these contributors, because they will tend to help in the future.
- Complete a written evaluation or report. Make sure you include:
  - Contact names, addresses, and phone numbers
  - Time lines and important dates
  - Suggestions of things to do differently

## Fundraising Ideas:

- *Coupon Book Sales/Discount Cards*
- *Drive-in Movies*
- *Special Events like:*
  - Date Auctions
  - Individual Auction
  - Silent Auctions
  - Student/Professor or Coworker Auction
- *Gourmet Coffee Sale*

- *Cooking Fundraiser – A Food Fest*
- *Band Night*
- *Open Mic*
- *Poetry Night*
- *Change Bottles/Penny Wars*
- *Donate A Dinner*
- *Bagel & Coffee Morning*
- *Celebrity Cookbooks*
- *Donut Sale*
- *Fasting*
- *Luau*
- *Spaghetti Dinner*
- *Bookstore Sponsorship*
- *Business Partnership*
- *Frequent Flyer Miles*
- *Partner with Another Grant Recipient*
- *Laundry*
- *Plasma Donation*
- *Charity Sporting Tournaments (baseball, basketball, volleyball, golf...)*
- *Final Basket/Shoot the Hoops Tournament*
- *Running Events*
- *Carnival/Opportunity Fair*
- *Circus "Stupid Human Tricks"*
- *Concessions/theme parks/clean-up facilities/staff campus events*
- *Dunkin' Booth/Photo Booth*
- *Face Painting*
- *Jail and Bail*
- *Money Tree*
- *Parking Cars for Events*
- *Shave your Head*
- *24-hour sponsored activity (dance, All Hands On)*
- *Eating Competition*
- *Serve at a restaurant*
- *As well as many more that are unusual and beneficial!*

**Note:** Fundraisers must be preapproved through the Center for Student Involvement.

### Who to Ask

Since so many organizations are in need of the same kinds of donations and will be asking the same companies, it is a good idea to think of all the different possibilities. Your best efforts will be made with those firms and companies that primarily market their products or services to college-age students.

Some examples are:

- Businesses located around campus are good, but sometimes they are overused and get approached a great deal. Be creative.
- Fast food companies (ice cream, frozen yogurt, hamburgers, etc.). You may need to ask the local manager or may need to write their district office. Many local fast food chains will provide free punch and drink cups if you are having a sporting event or project to benefit a local charity.
- Real estate companies that specialize in rentals to college students.
- Soft drink companies. Look for the local distributor.
- Health clubs.

*See Appendix G for Fundraising Proposal Idea Questionnaire.*

### Sponsorship & Donation

One of the best ways to increase fund raising efforts is to obtain sponsorship for an event, either through underwriting or direct contributions from companies. Corporations will help to fund an event if it is in their marketing plan. Are their customers likely to come to this event? Will sponsorship in an event help them attract new customers and get their name seen?

### How to Ask for Funding and/or Donation

If your club is considering applying for any grants and/or seeking sponsorship, you **must** see the office of University Advancement, located in Inlow 212 (541-962-3740) prior to filling out any paperwork with a business.

- Plan far in advance. Most corporations plan their donation budgets six to twelve months in advance. Talk to a company as early as possible. Do not expect to get donations in a month.
- Try to target a specific company who could definitely benefit from your cause rather than sending out blanket letters to everyone. By matching your cause and the company, there are better chances for a positive answer.
- Learn as much about the organization you are soliciting before you actually ask for a dime. Knowledge of the company, their products and services, and their past charitable events will help see if they are the right match for you.
- Address your pitch letter to the person in charge. Do not just write “To Whom It May Concern” or “Dear Sir/Madam.” Call and obtain the person’s appropriate name and title.
- Put your proposal in writing. Enlist the help of your marketing and business majors to write the proposal in marketing terms.
- State your cause in terms of benefits to the company. For example, a \$25 ad in an ad book or a \$25 poster that is going to be seen by 1,000 students at an event is inexpensive advertising for even small businesses.

#### What to Ask For

- *Product:* Straight-product contributions for samples to give to participants or for door prizes. Most companies have their products in trial sizes just for this purpose.
- *Ads for ad books, calendar or program:* Sell ad space in a campus calendar or program that is given out at the event you are sponsoring. You may want to give companies who donate products or supplies and materials free ads.
- *Printing:* Underwriting the cost of printing posters, flyers, or t-shirts. In return, you will put their name and logo on all printer material.
- *At an event:* Hang ads with logos on banners or posters for a fee. This is an excellent source of income at sporting events or anywhere there is a place to hang a poster during an event.

## Inclusive Programming

When programming, it is important to be mindful of the differences of the people in the community. Individuals striving to create, and maintain, inclusive communities must ask the following question: “Whose perspectives, experiences, viewpoints, and voices are included?” Below, you will find general questions to assist your community building efforts:

Have you considered gender bias and the use of gender-neutral language in your programming?

- Did you assume that only men in your community will be interested in participating in intramural football?

### PROGRAM PLANNING CHECKLIST

*Over the course of time, your student organization will most likely plan a program of some kind. Programs can range from social to educational, for a cause or simply for fun. When planning a program, there are many factors to consider. The who, what, when, where, why and how factors:*

- ✓ **Who** is involved with the program?
- ✓ **What** will the program accomplish?
- ✓ **What** are the costs involved with the program?
- ✓ **When** will the program happen?
- ✓ **Where** will the program be held?
- ✓ **How** will people know about the program?

- Did you assume that only women will be interested in doing a crafts project?
- Western society assumes that boys are supposed to act one way and girls another. Do not do the same.

Have you considered religious backgrounds, rituals and traditions in your programming?

- If you have food at your event, will students of diverse religious traditions be restricted from eating it (some Jewish or Islamic traditions, and non-eating of pork)? Will you have food at an event when certain students are fasting due to religious commitments and beliefs?
- In the month of December, will you have a Christmas party (while not acknowledging the other religious celebrations during the month)?
- The U.S., along with its practices and traditions, has been heavily influenced with Christianity. Be aware of how these beliefs have been engrained in your actions and ways of thinking, especially around the beliefs of other people.

Have you considered diverse racial and/or ethnic populations in your programming?

- Will your event attract people of different races and/or ethnic groups?
- Will your event culturally affirm, or demean, people of diverse racial and/or ethnic groups?
- Does your advertisement indicate, whether in pictures or words, that this event will be appreciated by people of different races or ethnic groups?
- Do not program as if the people in attendance will be of one particular race or ethnic group.

Have you considered the needs of students with disabilities in your programming?

- Is the activity location accessible by wheelchair?
- If you are having a speaker, will there be an American Sign Language ‘Interpreter’?
- If you are passing out handouts, are fonts large enough for individuals with seeing impairments?
- Do not assume that all students are (temporarily) able-bodied.

Have you considered the economic limitations faced by some students in your programming?

- Does it cost money to attend ALL activities planned?
- Are scholarships available for students who cannot afford to attend the planned event?
- Do not assume that all students can afford to attend your program.

Have you considered the heterosexual bias and the diverse sexual orientations of students in your programming?

- Does your advertising and dialogue before and at the program assume that all participants are heterosexual? For example, at a Valentine’s Day Dance, have you said that same sex couples will be welcome?

## Event Planning Timeline

NOTE: This timeline is to be used to spark ideas and reminders for you to create your own timeline specifically tailored to your needs.

### One Term in Advance

- Survey students
  - Beyond board/committee and friends
  - Do you have a target audience built-in?
  - Phone/paper surveys – consider raffle
- Review past program evaluations and reports
- Establish budgets
- Use event evaluations to solicit more ideas

- Determine audience: campus-only, open to general public, all-ages, family, etc.
- Choose events
  - Does it meet your mission?
  - Does it move your organization forward?
  - Does it serve/help your target audience?
- Choose event coordinator
- Check other calendars for conflicts
  - Your own organization
  - Other student organizations (governing organizations, etc.)
  - Athletics
  - Scheduling office
  - Buildings and grounds
  - Academic calendar (Avoid finals, Spring Break, etc.)
  - Holidays (school, religious (more than just Christian))
- Reserve locations/venues (include as many details as possible – and remember that the earlier submitted = the more likely you'll get your first choice!)
  - Reserve rain location for outdoor events
  - Green room (offstage preparation area)
  - Dressing room(s)
- Contact agent/performers – get all necessary information but be careful not to verbally commit to anything
- Consider liabilities/risk associated with event
- Identify possible co-sponsors
- Decide upon need for tickets, costs
- Consider people power needed for event – be realistic with your resources
- Create event checklist/calendar with specific dates and people responsible for each item on list

### Two-Three Months in Advance

- Contract performers. **NOTE:** Contracts are sometimes complicated legal documents. Do not sign any contract, or agree verbally without appropriate permission. Some performers require much more advance booking than others.
- Reserve housing for performers
- Obtain meal tickets/plan for performer meals
- Order supplies
  - Decorations
  - Tickets
  - Wristbands
  - Raffle tickets
  - Flowers
  - Awards
  - T-shirts
- Identify target marketing groups
- Identify/contract ticket outlets
- Get press release to University Advancement for publicity

### One Month in Advance

- Start promotion for event – announcements to media, teaser campaign
- Confirm housing and meals – retain confirmation numbers
- Arrange for performer payment with campus Accounts Payable office
- Review Technical Rider
- Arrange all Technical Considerations
  - Sound – microphones, tape decks/CD players, amps, speakers, cords, stands
  - Lights – bulbs, dimmers, wiring, gels
  - Staging – platforms, seating for audience, caution tape

- Special needs – projectors, screens, recording equipment, musical instruments (piano will need to be tuned), music stands, lecterns, furniture (couch, side table, etc.), mats, access to water
- Meet with supervisor/tech director for space to ensure equipment is working and will meet performer needs
- Rent additional equipment
- Order food for event
  - Backstage refreshments
  - Meals for performer(s)
  - Meals/snacks for crews
  - Concessions
  - How many people do you expect to attend?
  - What can you afford?
  - Meet with campus catering to arrange food order
  - Complete appropriate forms
  - Seek donations if appropriate
  - Don't forget vegetarians
- Confirm security
- Arrange for parking
- Talk with campus media for advertising and coverage of event; Contact other local media
- If open to public, contact other local schools, organizations, etc.
- Start determining staffing needs – be specific with duties and responsibilities
- Use committees – delegate responsibility and authority
  - PR Crew
  - Photographer
  - Ticket-takers
  - House Manager, ushers, box office
  - Concessions
  - Security
  - Load-In Crew/Grips
  - Load-Out Crew/Grips
  - Runners
  - Electrician
  - Sound Board
  - Spotlight Operators
  - Film Projectionists
  - Master/Mistress of Ceremonies
  - Welcome Committee, Guest Liaison(s)/Host(s)
  - Driver(s)
- Delegate creation of signage needed including directional signs
- Sponsorship banners including board/committee banner
- Design Marketing Campaign/Publicity – vitally important!
- Complete Program Checklist Form

### Three Weeks Before

- Distribute promotional materials/advertising
- Pick up supplies (obtain cash advance if necessary/able)
- Start ticket sales
- Finalize volunteer staff
- Create access badges/passes and list of recipients

### Two Weeks – One Week Before

- Second round of promo
- Word of mouth promotion campaign
- Pick up performer's check – lock in safe place
- Confirm all details with agent
- Send performer information pack
- Make sure all board/committee members and volunteers will be attending the program

- Gather performer welcome pack materials

### Day of Event

- Place signs and decorations
- Hand out flyers/handbills
- Make sure someone is at venue to greet guest if they are driving in on their own
- Make sure all appropriate persons are there for sound check (security, performer, tech crew), provide water/soda/juices if possible
- Make sure all volunteers are in place
- Don't forget to pick up any check(s)
- Keep talking up the event
- Make sure performer is introduced at beginning and thanked at end of program
- Provide water for stage
- Keep event on schedule
- Make sure volunteers have breaks if they are working entire event (delegate this responsibility)
- Clean-up following performance
- Inventory equipment and assess damage for repairs and reordering (such as light bulbs)

### Post-Event

- Return all rented or borrowed equipment
- Remove all advertising displays and posters
- Settle with all ticket outlets
- Turn in receipts
- Deposit cash
- Restock/order supplies if necessary
- Send out thank you's
- Jot down notes for file and future programs
- Attendance, budget with receipts
- Whether program met goals: review SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis
- Recommendations for new procedures, additions to event checklist, etc.
- Complete program evaluation/summary form – ideally with input of committee and volunteers

## Event Planning: Getting Started

Name of Event: \_\_\_\_\_

Date of Event: \_\_\_\_\_ Time: Set-up \_\_\_\_\_ Start \_\_\_\_\_ End \_\_\_\_\_ Tear down \_\_\_\_\_

Location of Event: \_\_\_\_\_ Rain site: \_\_\_\_\_ Reserved: yes no

Type of Event: \_\_\_\_\_

Questions to consider:

- What are the goals of this event? \_\_\_\_\_
- Who are the targeted participants? \_\_\_\_\_
- What is the number of the projected participants? \_\_\_\_\_
- What ideas have been developed to meet these goals? \_\_\_\_\_

Available Resources (money, knowledge, time, people):

- Budget: what amount of money is available? What amount of money is needed? \_\_\_\_\_
- Number of weeks until target date? \_\_\_\_\_
- What skills & knowledge are needed? \_\_\_\_\_
- Who is committed to supporting this event? \_\_\_\_\_
- What equipment, supplies, etc. are needed to host this event? \_\_\_\_\_

Who are potential partners or collaborators? \_\_\_\_\_

What regulations and procedures will influence our plan? \_\_\_\_\_

What relationships are critical for the success of this event? \_\_\_\_\_

Who might be in opposition to this event? \_\_\_\_\_

What plan do you have in place for “caring” for relationships in relation to this event? \_\_\_\_\_

Is there any component of this event that requires risk or liability assessment? \_\_\_\_\_

Create a detailed action plan: X by Y by Who (What, When, Who)

**Timeline:** Over all timeline (start to finish)

**Committee Structure:** How many project committees are necessary for success of event?

**Committee Action Plan:** Responsibilities & Timeline:

- What needs to be done?
- When does it need to be done?
- Who is going to do it?

## Publicizing Your Event

The following tips may be helpful in publicizing your opportunity or event. Use some, or use them all—just make sure to get special permission when required.

### On-Campus

- Create a press release and submit to the Public Information Assistant in University Advancement.
- Explore digital means of spreading the word: digital signage, message of the day on computers, emails, etc.
- Contact the campus & local newspapers for placement in their calendar of events.
- Create flyers for posting on campus bulletin boards.\*
- Write a note on classroom wipe boards /chalkboards. Get approval as necessary.
- Contact campus or local radio and ask if they'd donate a PSA (public service announcement).
- Chalk sidewalks in prominent locations around campus.\*
- Create table tents for display.\*
- Have a display or table in one of the academic buildings. Reserve through building manager.
- Go to a department head or faculty / staff meeting, or directly contact faculty / staff to make sure they know about your event. They may announce it in class! Seek permission to attend prior.
- Have a mini-event as a teaser in the middle of the cafeteria, in a class (get instructor permission first), or in an academic building lobby area.\*
- Obtain permission from residence life or campus to place postcards in residents' mailboxes. No need for a stamp!
- Announce your event in your classes.
- Use A-frame boards around campus to display with posters around campus.
- Go to other organizational meetings to announce your event.
- Make sure student government (particularly Senators) know about your event & publicize it.

### Community

- Create flyers for posting in the community. Grocery stores, churches, daycare centers, department stores, bars, laundry mats, and other high-traffic establishments are good, depending on whom you are targeting.

### Tips For Everywhere

- Word of mouth is important! Get people excited about your event. Talk it up and involve others.
- Create handbills to hand out.
- Purchase balloons with your information printed on them, or take the cheaper route, and write on balloons, then blow them up.
- Create banners (i.e., butcher paper) or odd sizes to catch peoples' attention.
- See if your presenter has professionally made posters you can use for free. You may need to write dates, times, and locations, on them.
- Purchase professionally made stickers, or make them yourself with sticker kits (available at most discount stores), or with Avery labels through your laser printer!
- Use social media (Facebook, Twitter, etc) to broadcast your event/activity.

**\* Approval must be granted through the Center for Student Involvement prior to distribution/posting.**

## Officer Transition

One of the most important functions of an advisor is to assist in the transition from one set of organization officers to the next. To assist with the stability of the organization, the advisor has seen changes, knows what works and can help maintain continuity. Investing time in a good officer transition early on will mean less time spent throughout the year nursing new officers through the quarter.

The key to a successful transition is making sure new officers know their jobs BEFORE they take office. Expectations should be clearly defined. There are a number of ways to conduct the officer transition. The following examples demonstrate two commonly used methods.

### The Team Effort

The team effort involves the outgoing-officer board, the advisor, and the incoming-officer board. This method involves a retreat or series of meetings where outgoing officers work with incoming officers on:

- Past records/notebooks for their office and updating those together
- Discussion topics should include:
  - Completed projects for the past year.
  - Upcoming/incomplete projects.
  - Challenges and setbacks.
  - Anything the new officers need to know to do their job effectively.

The advisor's role may be to:

- Facilitate discussion and be a sounding board for ideas.
- Organize and provide the structure of a retreat.
- Offer suggestions on various questions.
- Refrain from telling new officers what they should do.
- "Fill in the blanks." If an outgoing officer doesn't know how something was done, or doesn't have records to pass on to the new officer, you can help that officer by providing the information he or she doesn't have.

The structure of a team effort retreat can take many forms. The advisor's role in this process is to provide historical background when needed, help keep goals specific, attainable and measurable and provide advice on policies and procedures.

### One-on-One Training, Advisor with Officers

While it is ideal to have the outgoing officer team assist in training the incoming officers, often it is left up to the advisor to educate the incoming officers. After that meeting, the advisor should meet individually with each officer; examine the notebook of the previous officer (or create a new one).

Things to include in a new notebook:

- Any forms the officers may need to use
- Copies of previous meeting agendas
- A copy of the organization's constitution and bylaws

Talk about what the officers hope to accomplish in the forthcoming year. Assess the officer's role in the organization. What are the expectations of each position? What are the student's expectations of the position and his/her goals?

**Note:** A complete transition handbook can be viewed at <http://www.eou.edu/csi/files> and/or provided to advisors through the Center for Student Involvement.

# Retreats

## *Why Should Your Organization Have a Retreat/Workshop?*

- Organization retreats and workshops enable student organizations to briefly get away from the distractions of school and work and to focus on the needs of the organization and the needs of the individual members of the organization. Planning for the future will enable an organization to operate more efficiently. By setting goals and planning together, members of an organization can operate more effectively as a team.

## *Establish the Purpose For Your Retreat*

- Team Building, Skills Training, Communications, Goal Setting, Problem Solving, Planning, Learning, Orientation, Socializing, Transition, Revitalization, Conflict Resolution

## *Determining Who the Retreat is For*

- New Officers, Executive Board, All Organization Members, etc.

## *Selecting a Facility*

- On Campus or Off Campus; convenience vs. isolation; Urban or Rural Getaway. When looking for an off campus retreat location consider nearby summer camps. They often charge cheap rates in the off season. Be sure to check availability, accessibility, and accommodations. Don't forget about costs and contracts. Areas commonly used include: Wallowa Lake, La Grande Public Library Conference Room, and Cove Ascension School.

## *Transportation*

- If your event is off campus, members should be provided with adequate and safe transportation.

## *Food And Drink*

- Before deciding on a menu consider cost, cooking facilities, preparation and clean up. Try cooking together; it makes a great team building activity. On a tight budget? Consider potluck.

## *Selecting the Best Format*

- Workshops presented by an "expert" -advertising, program planning, public speaking, fund-raising, etc.
- Experiential Exercises - team building, brainstorming, communications skills, ropes course, etc.
- Recreational Exercises - skiing, hiking, canoeing, biking, etc.

## *Selecting the Facilitators and Presenters*

- Organization Officers, Organization Members, Faculty Advisor, Other Faculty Members.

## *Planning the Retreat*

- Have members sign up to participate on committees. Remember people support what they help to create. Suggested committees: Transportation, Food/Drink, Lodging, Recreation, Programming, Clean-Up

## *Resources in Developing Resources Your Workshops and Exercises*

- Structured experiences books, reference books, videotapes; Faculty Advisor; Faculty Members

## *Evaluating Your Retreat*

- Evaluation Forms. Ask members what they thought of the experience. What would they change? What would they keep the same? Ask the presenters what they thought of the experience. What could have made it better?

## **Sample Retreat Schedule**

What To Bring: Sleeping bag or linens and blanket pillow. Clothes that can get dirty! Comfortable walking shoes. Your imagination! Towel and personal toiletries. A hat of any kind. Cross country skis (if you have them-let Reed Wood know if you need skis).

Travel Information: We will meet in the college parking lot at 8 a.m. on Saturday, February 22. We will return to campus at 5:00 p.m. on Sunday, February 23.

### DAY ONE

8:00 a.m.	Depart College
9:30 a.m.	Arrive at Lodge
10:00 a.m.	Icebreaker
10:30 a.m.	Teamwork Exercise
Noon	Sandwich Lunch
1:00p.m.	Icebreaker/Energizer
1:15 p.m.	Creativity Exercise
3:15 p.m.	Free Time
4:30 p.m.	Pizza Bake
5:30 p.m.	Sing for your supper
6:15 p.m.	Free
6:45 p.m.	Energizer
7:00 p.m.	Team Games
8:30 p.m.	Free-time; Night!

### DAY TWO

8:30 a.m.	Breakfast
9:00a.m.	Cross Country Ski
Noon	Build our own lunch
1:15 p.m.	Creativity Exercise
2:45 p.m.	Closing
3:00p.m.	Pack for departure

# Parliamentary Procedure

## *What is Parliamentary Procedure?*

- Parliamentary procedure is a set of rules for conducting meetings. It allows for everyone to be heard and to make decisions without confusion.
- Today, Robert's Rules of Order, Newly Revised is the basic handbook of operation for most clubs, organizations, and other groups. Robert's Rules can be found in most libraries.

## *A Very Abridged Version of Robert's Rules*

- The degree of order needed at a meeting is dependent upon the size and purpose of the group. The following are some basics of Robert's Rules of Order, which may be helpful for groups that need a degree of normality in conducting business.

## *The Motion*

- You may make a motion when you want the group to take some action: to send a letter, to accept a report, to hold a special meeting, to spend money for some special purpose, etc.
- Introduce the motion by saying, "I move that," followed by a statement of the proposal. You cannot discuss the motion until someone has seconded it. This is done to reduce the number of discussions on a subject in which no one else in the group is interested.

## *The Amendment*

- Amendments are offered in the same way as a motion. You may offer an amendment when you agree substantially with the motion which has been made but want to make some changes before it is adopted.

## *Amending the Amendment*

- Just as a motion may be amended, an amendment may also be changed in the same way. As with the first amendment, the second amendment must relate to the motion and the amendment. It is in order only when it relates to both. No more than two amendments may be made to one motion.

## *Substitute Motion*

- The substitute motion is sometimes used when there is a motion and two amendments on the floor in order to save the time of the meeting. If there does not seem to be substantial disagreement with the motion and the two amendments, a substitute motion incorporating all three into one motion may be made and accepted by the chair.
- Note: If you disagree with a motion or an amendment, you do not defeat it by trying to change the sense of the motion through amendment. You speak against the motion or amendments and urge the membership to vote against them. Then new motions calling for different action may be made and considered.

## *Speaking on Motions and Amendments*

- When you want to speak at a meeting, you raise your hand and ask the chair for the floor. As soon as you are recognized by the chair, you may proceed to speak either for or against the motion or amendments being considered.
- When several members wish to speak at the same time, these guiding principles should determine the decision of the chairman:
  - The chairman should show preference to the one who made the motion.
  - A member who has not spoken has first choice over one who has already spoken.

- If the chairman knows the opinions of members discussing the measure, he/she should alternate between those favoring and those opposing it.

#### *Motion to the Table*

- If you wish to postpone or end debate on an issue, you may also make a motion to table. Such a motion is not debatable, and if it is seconded by one other member, the motion must be put to an immediate vote by the chair. The chair may discuss the reason for tabling with the member.

#### *Calling a Question*

- In order to speed up the meeting and eliminate unnecessary discussion, a member can “call the question.” The chair will call for dissent. If you want the motion to be discussed further, raise your hand. If there is no dissent, voting on the motion takes place.

#### *Voting*

- Voting on a motion can be as formal as using written ballots or as casual as having the chair ask if anyone objects to the motion. The most common practice is to call for a show of hands or a voice vote of ayes and nays. Only members present at the time may vote unless the rules of the organization allow for proxies or absentee ballots.
- A simple majority of votes cast will pass most motions. During elections when more than two candidates are running for an office, your organization rules should specify whether a majority or plurality is necessary. These rules can also call for other requirements depending on the issue on which the vote is held.

#### *When the Chairperson Can Vote*

- Assuming that the chairperson is a member of the organization, he/she has the right to vote whenever a written or secret ballot is used. With any other method of voting, to protect the impartiality of the chair, he/she should vote only when it will change the outcome.

#### *Point of Information, Of Order*

- If at any time during the meeting you are confused about the business being discussed or if you want the motion that is being considered more clearly explained, you may rise to ask the chairman for a point of information. After you are recognized, ask for the explanation which you desire.
- If you disagree with any of the chair’s rulings, or if you believe that the person who is speaking is not talking about the business being considered, you may raise a point of order and state your objection to the chair. The chair then is required to rule one way or another on your point of order.

### **Sample Meeting Agenda**

#### **I. Call to order**

The chairperson says, “The meeting will please come to order.”

#### **II. Roll Call**

Members say “present” as their name is called by the secretary.

#### **III. Minutes**

The secretary reads a record of the last meeting.

#### **IV. Officers’ Reports**

Officers give a report to the group when called on, usually limited to a time if necessary.

#### **V. Committee Reports**

First come reports from “standing” committees or permanent committees, then “ad hoc” or special committees.

#### **VI. Special Reports**

Important business previously designated for consideration at this meeting.

#### **VII. Old Business**

Items left over from previous meetings.

#### **VIII. New Business**

Introduction of new topics.

#### **IX. Announcements**

Informing the assembly of other subjects and events.

#### **X. Adjournment**

The meeting ends by a vote or general consent.

To Do This:	You Say This:	May You Interrupt the Speaker?	May You Be Seconded?	Is the Motion Debated?	Is the Motion Amendable?	Votes Required to Pass?
Introduce business	"I move that..."	No	Yes	Yes	Yes	Majority
Object to incorrect procedure being used	"Point of order"	Yes	No	No	No	No vote is taken, chair rules
Seek clarification from the previous speaker	"Point of information"	Yes, if urgent	No	No	No	No vote is taken, chair rules
Object to something which prevents your continued participation (ex. Excessive noise)	"Point of personal privilege"	Yes	No	No	No	No vote is taken, chair rules
Object to a motion being considered	"I object to consideration of this motion"	Yes	No	No	No	2/3 majority
Consider something out of its scheduled order	"I move the agenda be amended in order to deal with the following item..."	No	Yes	No	No	2/3 majority
Overturn the ruling of the chair	"I challenge the chair on...," "I appeal the chair's decision"	Yes	Yes	Yes	No	Majority
Change/Amend a motion	"I move that the motion be amended to read..."	No	Yes	Yes	Yes	Majority
Have a motion studied more before voting on it	"I move to the motion be referred to"	No	Yes	Yes	Yes	Majority
End further discussion on a motion until later in the meeting	"I move that the motion be tabled until..."	No	Yes	Only to time	Yes	Majority
Postpone consideration of motion until a future meeting	"I move that the motion be postponed until..."	No	Yes	Only to time	Yes	Majority
Raise a matter previously tabled	"I move that the motion...be lifted from the table"	No	Yes	No	No	Majority
Reconsider a motion already voted on earlier in the meeting	"I move that the motion...be reconsidered"	Yes	Yes	Yes (if original motion was)	No	Majority
End debate on a motion	"I call the question" or "I move the previous question"	No	Yes	No	No	2/3 majority
Suspend rules temporarily	"I move to suspend the rules so that..."	No	Yes	No	No	2/3 majority
Ask that everyone's vote on a particular motion be recorded in the minutes	"I call for a roll call vote"	No	No	No	No	No vote required, chair rules
Verify a voice vote by having members stand	"I call for a division" or "Division!"	Yes	No	No	No	None
Recess the meeting	"I move that the meeting recess until..."	No	Yes	Only to time	No	Majority
End the meeting	"I move that the meeting adjourn"	No	Yes	No	No	Majority



## Membership and Recruiting

New members are the lifeblood of every organization. They bring new ideas, increase the organization's person power, foster organizational growth, prevent member burn out, and take over leadership roles when you leave.

People join organizations for many reasons. They want to get involved, meet people and make new friends. They want to develop skills and have fun. Groups need new members because they bring new ideas and talents in addition to replacing old members. It is vital that an organization has a well-conceived and executed recruitment and retention plan.

Recruitment and Retention is the responsibility of every member of your organization! Every member must be involved in the planning and implementation of a recruitment and retention campaign. Some organizations create a Membership Development Committee that oversees the design and implementation of a recruitment campaign, maintains membership information, plans and implements members training programs, coordinates the leadership selection/election process and plans social functions to enhance team building.

The following suggestions will help make your organization's recruitment efforts more successful:

### Know and Understand Your Organization

It is important that both the leadership and the membership know what the organization goals and objectives are.

- Have an organizational meeting to discuss goals and objectives. Are your goals still accurate? Is it time to update them? Where do you plan for the organization to be in six months? A year?
- Decide on a direction to take. During this "organizational housekeeping" process, a certain theme or direction should become clear. What is this?
- Develop a membership profile. What type of people do you need to help the group succeed? Who would you like to have join? Who would complement your current membership?

### Set Recruitment Goals

Now that you know the type of people you are interested in recruiting, the 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 pre-designated recruitment period? Will you hold a mass meeting or is membership by invitation only?

**Note:** Eastern Oregon University prohibits harassment including sexual harassment and discrimination in any of its educational, social, and professional development programs. A full description can be found under Oregon Administrative Rules (ORA) 580-015-0010 through 580-015-0160 and Oregon Revised Statutes 659A.850 and 659A.855.

- Keep your membership profile in mind. When designing your recruitment strategy, ask yourself what places do these prospective members most likely frequent? Do they have special interests? What kind of publicity would attract their attention?
- Remember what made you get involved. Probably the most important step in designing a recruitment strategy is for you to think back to when you first became involved. What attracted you? How were you recruited? If you weren't, how did you hear about the group? Why have you stayed involved?

## Get Everyone Involved

Have your current members identify people they know who might want to get involved. Personally invite them to attend a meeting. Word-of-mouth is the best and least expensive type of publicity you can use.

- Talk about your group. Tell people what you have to offer them. Ask them about themselves – and really listen.
- Sell your organization and the benefits of membership. Tell them how the organization can benefit someone like them. Personalize the message to each potential member. Let them know how their talents, skills, and interests would help the organization.

## Design an Advertising Campaign Using Visual Elements

Recruitment campaigns need to have a visual element as well. Have those members with artistic talents work on your posters, flyers, banners, bulletin boards, etc. Be creative. Get the publicity up early enough. (Read the section in this handbook regarding Publicity and Promotion to make your publicity as effective as possible.) Your publicity can be effective only if it's noticed.

## Plan a Special Welcoming Meeting

Many groups find it beneficial to have a meeting or ceremony to welcome new members. Group participation in some form of official initiation process is one way to make your members feel wanted, needed and appreciated.

## Hold an Orientation for New Members

Developing and conducting an organizational recruitment campaign is very important. Yet, as we all know, retaining these new members is another matter entirely.

- Don't make a mistake – Train your new recruits. All too frequently, groups skip any form of orientation and just place their new recruits directly on committees or organizational projects.
- Teach them about your organization. Although involvement is crucial to the longevity of the group, understanding the organization and its goals and objectives, structure, norms, and taboos is equally as important. By taking the time to orient new members to the privileges and responsibilities of membership, you create a more educated membership – people who can and will make significant contributions to the organization.
- Elements of a successful orientation program:
  - The rights and responsibilities of members.
  - Organizational governance, operating policies, and procedures.
  - Organizational history, traditions, and programs.
  - Assimilation of new members into the organization.
  - An overview of campus services, activities, programs for student organizations.
  - Information about any support groups or affiliations a group may have.

## Retention: Tips and Suggestions

- Remember that a personal contact is always better than 1000 flyers and newspapers advertisements. People join organizations because they like the people they find there. Nothing can replace the simple act of getting to know someone and asking them to join the organization.
- Get scheduled to make a brief introduction of your organization at other meetings and functions.
- Co-sponsor campus events so that the group name gets out there more. Be sure to have information about the group at each event.
- Ask key people to give recommendations of possible members and leaders.
- Don't expect a person to come to a meeting in a room full of people they don't know. Offer to meet the student somewhere and go to the meeting together. Then make sure you personally introduce that person to others in the group.
- Have a membership drive.
- Recruit people by the issue that interests them. There are people very interested in one issue, you can recruit them to head up a program on that issue.

### Have a Retention Campaign!

Continually recruiting and training new members takes a lot of time and energy. Set new members up for continued involvement. An Incorporation Packet gives new members information about the organization and current members information about the new members.

#### Incorporation Packet

- ✓ *Interest Form* –Personal data, skills, experience, expectations, class/work schedule, interest areas
- ✓ *Statement of Organizational Philosophy and Goals* - Copy of Constitution. Description of what your organization does, for who, and why.
- ✓ *Committee and Position Description* – Should be specific without limiting creativity and individuality.
- ✓ *Organizational Flow Chart* – Shows leadership positions. Helps people understand how the organization functions.
- ✓ Analyze the needs of your members. Remember why people get involved in the first place and then meet those needs.

- When someone has expressed an interest in getting involved to any degree in your organization, immediately get them involved and give them a meaningful task to do.
- Go out of your way to make new members or potential members feel like “players” right away.
- Hold meetings and events in comfortable, visible, easy-to-come-to places.
- Make a list of all of the advantages of being a member. This could include public speaking opportunities, or any number of other things. Use this list of advantages as your major selling points for new members.
- Always take photos at meetings and events, and then put together a scrapbook for prospective members to see.
- Create a display that you can set up in the hall.
- When working to recruit members, always try to think in terms of “what’s in it for them.”
- Have an informational meeting.
- Rent a video camera and make your own recruitment video. It’s ok if it’s amateur and sloppy, just make it funny! Show your group members at an event. Show a few minutes of a typical meeting.
- Show your members hanging out, playing cards. Whatever! The more hilarious, the better.
- Print up business cards for your members to carry. Be sure to have a place for members to write his/her own name and number, but the card should also say, “Open meetings! Please come!”

# Motivation

## Specific Ways to Increase Motivation

- ✓ Give others credit when it is due them.
- ✓ Use “We” statements, and not “I.”
- ✓ Play up the positive and not the negative.
- ✓ Make meetings and projects appear attractive and interesting.
- ✓ When you are wrong, admit it.
- ✓ Use members’ names often.
- ✓ Let members in on the early stages of plans.
- ✓ Be fair, honest, and consistent – show no favoritism.
- ✓ Be careful what you say – do not gossip.
- ✓ Listen to others.
- ✓ Expect only the best and be proud when members achieve it!

### Communicate

People like to know what is going on in the organization. They want to be told about problems, objectives, and “inside information.”

They feel recognized and important when they are kept informed. Two-way communication within the organization is necessary in order to achieve a mutual understanding. Mutual understanding leads to motivation!

### Give Security

People need more than financial security. People will look to you for intrinsic security. For example, they must know that you like them, respect them understand them and accept them not only for their strong points, but also for their weaknesses.

### People Need You – People Need People

They need you to give them what they want and need: intrinsic satisfaction. When you give them what they want, they will give you what you want. This is what motivation is all about. It is not something you do to other people, but something they do for themselves. You give them the reasons and that makes you the motivator – a person who gets things done through others.

### Develop Purpose

Always explain why. Instill in the members that their assistance is vital for success. Share ways that participation can encourage personal growth.

### Encourage Participation in Group Goal Development

Include all members when planning goals. Consider and follow through on members’ suggestions. Remember that we support that which we help to create.

### Develop a Sense of Belonging

People like to belong. Those who feel like they belong will more likely invest themselves.

### What do others want?

It is NOT money or personal gain that most people want. They want intrinsic satisfaction. People will work harder for intrinsic satisfaction than they will for monetary income. The following are some ways that you as a leader can help people satisfy those intrinsic needs:

### People Need to Feel Important

See people as worthwhile human beings loaded with untapped potential. Go out of your way to express this attitude.

### Give Praise

Reinforce for continual achievement. All people need praise and appreciation. Get into the habit of being “praise-minded.” Give public recognition when it is due.

### Give People Status

The more status and prestige you can build into a committee or an organization, the more motivated the members become. There are many status symbols you can use to make others feel important. For example, develop a “Member of the Week/Month” Award or “Committee Chairperson of the Month” Award. In addition, simply treating people with courtesy is a way of giving them status.

## GRAPE Theory of Motivation

**Growth** Being able to increase one's skills and competencies, performing new or more complex tasks, participating in training programs.

**Recognition** Promotion within the organization, praise for achievements, positive and constructively critical feedback, receiving an award, printed references to an individual's activities, being "listened to."

**Achievement** The opportunity to solve a problem, to see the results of one's efforts, to reach goals that one has established to create a 'whole' tangible product.

**Participation** Involvement in the organizational decision making, planning and scheduling one's own work and controlling one's own work activities.

**Enjoyment!** Having fun in a warm, friendly, supportive atmosphere.

## 21 Tips for Advisors to Increase Organizational Productivity

1. Know what the students expect of you as an advisor.
2. Let the group and individual members know what you expect of them.
3. Express a sincere interest in the group and its mission. Stress the importance of each individual's contribution to the whole.
4. Assist the group in setting realistic, attainable goals. Ensure beginning success as much as possible, but allow the responsibility and implementation of events to lie primarily with the organization.
5. Have the goals or objectives of the group firmly in mind. Know the purposes of the group and know what things will need to be accomplished to meet the goals.
6. Assist the group in achieving its goals. Understand why people become involved. Learn strengths and emphasize them. Help the group learn through involvement by providing opportunities.
7. Know and understand the students with whom you are working. Different groups require different approaches.
8. Assist the group in determining the needs of the people the group is serving.
9. Express a sincere interest in each member. Encourage everyone to be responsible.
10. Assist the members in understanding the group's dynamics and human interaction. Recognize that at times the process is more important than the content.
11. Realize the importance of the peer group and its effect on each member's participation or lack thereof.
12. Communicate that each individual's efforts are needed and appreciated.
13. Assist the group in developing a system by which they can evaluate their progress. Balance task orientation with social needs of members.
14. Use a reward system and recognition system for work well done.
15. Develop a style that balances active and passive group membership.
16. Be aware of the various roles that you will have: clarifier, consultant, counselor, educator, facilitator, friend, information source, mentor, and role model.
17. Do not allow yourself to be placed in the position of chairperson.
18. Be aware of institutional power structure—both formal and informal. Discuss institutional developments and policies with members.
19. Provide continuity for the group from term to term (not mandatory but encouraged).
20. Challenge the group to grow and develop. Encourage independent thinking and decision-making.
21. Be creative and innovative. Keep a sense of humor

## 50 Ways to Give Recognition to Volunteers

- Smile
- Put up a volunteer suggestion box
- Treat to a soda
- Ask for a report
- Send a birthday card
- Arrange for discounts
- Give service stripes
- Treat to ice cream
- Plan annual ceremony occasions
- Recognize personal needs and problems
- Be pleasant
- Post honor roll in reception area
- Respect their wishes
- Give informal socials
- Keep challenging them
- Send a Thanksgiving card to the person's family
- Say "Good Morning"
- Greet by name
- Provide a pre-service training
- Help develop self confidence
- Award plaques to sponsoring group
- Take time to explain fully
- Be verbal
- Give additional responsibility
- Afford participation in team planning
- Respect sensitivities
- Enable to grow on the job
- Send newsworthy information to the media
- Say "Good Afternoon"
- Honor their preferences
- Create pleasant surroundings
- Welcome them to staff meals
- Have a public reception
- Take time to talk
- Defend against hostile or negative staff
- Make good plans
- Throw a pizza party
- Plan a theater party
- Recommend to prospective employer
- Utilize as consultants
- Praise them to their friends
- Say "Thank you"
- Smile
- Be a real person
- Plan occasional extravaganzas
- Send impromptu fun cards
- Attend a sports event
- Have a picnic

## Appendix A: Campus Resources

*Academic Advising:*

Inlow 112  
541.962.3378  
advising@eou.edu

*ASEOU (Student Government):*

Hoke 206  
541.962.3387  
aseou@eou.edu

*Athletics Office:*

Quinn Coliseum  
541.962.3364

*Alumni/ University Advancement:*

541.962.3740  
alumni@eou.edu

*AV Services:*

541.962.3388  
helpdesk@eou.edu

*Bookstore:*

Hoke Union Building  
541.962.3691  
bookstore@eou.edu

*Campus Security:*

541.962.3911

*Career Advising:*

Inlow 112  
541.962.3588  
advising@eou.edu

*Catering (Sodexo):*

Hoke Union Building  
541-962-3751

*Center for Student Involvement:*

Hoke 204  
541.962.3705  
center@eou.edu

*Copy Center:*

Badgley 105-A  
541.962.3505  
copysvc@eou.edu

*Counseling Services:*

Student Health Center  
541.962.3524

*Disability Services:*

Loso 234  
541.962.3663  
disabsvc@eou.edu

*Facilities Scheduling:*

Hoke 315  
541.962.3575  
schedule@eou.edu

*Financial Aid Office:*

Inlow 201  
541.962.3661  
fao@eou.edu

*Multicultural Center:*

Hoke 209  
541.962.3741  
bmoses@eou.edu

*Outdoor Program:*

Hoke 102  
541.962.3621  
mhatch@eou.edu

*Registrar's Office:*

Inlow 105  
541.962.3607  
registrar@eou.edu

*Residence Life:*

Hoke 216  
541.962.3553  
reslife@eou.edu

*Student Health Center:*

541.962.3524

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## Appendix B: Month by Month Calendar for EOU Student Club/Org Advisors

### September

- Make sure officers are aware of Fall trainings that occurs every October/November.
- Review the policies and procedures as outlined in the Club Manual for any updates added during summer.
- Review the club/organization constitution and by-laws. Make sure you have the most current copy of these documents before school resumes and submit changes to Center for Student Involvement.
- Welcome Week activities during the first week of school including Student Activities & Involvement Fair (first Wednesday of fall term).
- Establish a regular meeting time with the organization officers.
- Make sure Center for Student Involvement has all necessary forms including Intent to Be Active Form.

### October

- Hold club/organization retreat (if not done in September).
- Attend Fall trainings with club/organization officers.
- Assist club/organization with fundraising brainstorming and implementation.
- Encourage student participation in Homecoming events.
- Around midterms, watch officers' academics. Are they studying and attending classes?

### November

- Begin discussing with student officers their plans for winter term (programming, recruiting, fundraising, etc.)

### December

- Begin to identify future leadership of the organization. Encourage current leaders to be preparing other members for leadership roles.
- Meet with officers to evaluate the past term.

### January

- Review winter term activities with officers. Have them review plans with the members.

### February

- Encourage student club to think about fundraising concepts and implementation.
- Begin discussing with student officers their plans for spring term (programming, recruiting, fundraising, etc.)
- Around midterms, keep an eye out that officers are studying and attending class.

### March

- Encourage members of club/organization to attend the EOU Student Leadership Conference in April.

### April

- Attend Student Leadership Conference.
- Review spring term activities with officers. Have them review plans with the members.
- Conduct officer transitions and elections for next year.

### May

- Assist with officer transitions.
- Evaluate the year with club/organization members. Discuss strengths, areas to improve, and expectations for the new officers and the advisor.

### Summer (June – August)

- Do a self-evaluation of your role as advisor.
- If you and the officers are around in the summer, begin planning for fall including retreat.

## Appendix C: Advisor's Self-Evaluation Checklist

Please answer the following questions as they relate to your role as a student organization advisor. Fill in the blanks in front of each question using the following scale:

**5 = all the time**      **4 = most of the time**      **3 = some of the time**      **2 = almost never**      **1 = never**

- \_\_\_\_\_ I actively provide motivation and encouragement to members.
- \_\_\_\_\_ I know the goals of the organization.
- \_\_\_\_\_ I know the group's members.
- \_\_\_\_\_ I attend regularly scheduled executive board meetings.
- \_\_\_\_\_ I attend regularly scheduled organizational meetings.
- \_\_\_\_\_ I meet regularly with the officers of the organization.
- \_\_\_\_\_ I attend the organization's special events.
- \_\_\_\_\_ I assist with the orientation and training of new officers.
- \_\_\_\_\_ I help provide continuity for the organization.
- \_\_\_\_\_ I confront the negative behavior of members.
- \_\_\_\_\_ I understand the principles of group development.
- \_\_\_\_\_ I understand how students grow and learn.
- \_\_\_\_\_ I understand the principles that lead to orderly meetings.
- \_\_\_\_\_ I have read the group's constitution and by-laws.
- \_\_\_\_\_ I recommend and encourage without imposing my ideas and preferences.
- \_\_\_\_\_ I monitor the organization's financial records.
- \_\_\_\_\_ I understand the principles of good fund raising.
- \_\_\_\_\_ I understand how the issues of diversity affect the organization.
- \_\_\_\_\_ I attend conferences with the organization's members.
- \_\_\_\_\_ I know the steps to follow in developing a program.
- \_\_\_\_\_ I can identify what members have learned by participating in the organization.
- \_\_\_\_\_ I know where to find assistance when I encounter problems I cannot solve.

## Appendix D: Advisor/Student Evaluation and Feedback Tool

Please take 15-20 minutes to share your thoughts on the questions and statements listed below. Your feedback is valuable to my professional development. Please use a scale of 5-1 to rate your answers, 5 being the best score.

- |     |  |           |
|-----|--|-----------|
| 1)  | I am satisfied with the amount of time our advisor spends with our group         | 5 4 3 2 1 |
|     | Comments:  |           |
| 2)  | I am satisfied with the quality of time our advisor spends with our group        | 5 4 3 2 1 |
|     | Comments:  |           |
| 3)  | I am satisfied with the amount of information our advisor shares with our group  | 5 4 3 2 1 |
|     | Comments:  |           |
| 4)  | I am satisfied with the quality of information our advisor shares with our group | 5 4 3 2 1 |
|     | Comments:  |           |
| 5)  | Our advisor is familiar with the goals of our group                              | 5 4 3 2 1 |
|     | Comments:  |           |
| 6)  | Our advisor advises our group in a way consistent with our goals                 | 5 4 3 2 1 |
|     | Comments:  |           |
| 7)  | Our advisor adjusts his/her advising style to meet our needs                     | 5 4 3 2 1 |
|     | Comments:  |           |
| 8)  | Our advisor is a good listener   | 5 4 3 2 1 |
|     | Comments:  |           |
| 9)  | Our advisor understands the dynamics of our group                                | 5 4 3 2 1 |
|     | Comments:  |           |
| 10) | Our advisor role models balance and healthy living                               | 5 4 3 2 1 |
|     | Comments:  |           |
| 11) | Our advisor challenges me to think   | 5 4 3 2 1 |
|     | Comments:  |           |
| 12) | Our advisor allows me room to make and execute decisions                         | 5 4 3 2 1 |
|     | Comments:  |           |

Additional Comments (use the back of this sheet if necessary):

## Appendix E: Fundraising Proposal Idea Questionnaire

1. What new projects is your organization planning for the next two to three years?

Project A:

Project B:

Project C:

Project D:

2. Which of these projects are compatible with your organization's current mission and purpose? (When a project falls outside your mission, considerable justification will be necessary to convince a funder to support it.) (Check the category that applies to each project.)

Project	Compatible with Mission	Not Compatible
---------	-------------------------	----------------

A

B

C

D

3. What is unique about your organization's project?

Project	Uniqueness
---------	------------

A

B

C

D

4. Who else is doing this project? Is there duplication of effort? Can a partnership be formed that will benefit all organizations concerned with this project?

Project	Duplicate Project (with whom)	Possible Collaboration (with whom)
---------	----------------------------------	---------------------------------------

A

B

C

D

5. What community need does each of your organization's projects address?

Project	Need Addressed
---------	----------------

A

B

C

D

6. What members of your community—including civic leaders, political figures, the media, and your organization's clients—support each project?

Project	Supporters
---------	------------

A

- B
- C
- D

7. Does your organization currently have the expertise to undertake each project? If new staff are necessary, can the organization manage growth in personnel effectively? (Check the category that applies to each project.)

<b>Project</b>	<b>Expertise</b>	<b>Effective Growth Management</b>
----------------	------------------	------------------------------------

- A
- B
- C
- D

8. Is there internal support for the project? External support? (Check the category that applies to each project.)

<b>Project</b>	<b>Internal Support</b>	<b>External Support</b>
----------------	-------------------------	-------------------------

- A
- B
- C
- D

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## Appendix F: Advisor/Student Leader Role Review Exercise

Advisors should initiate a meeting with their newly elected officers in order to openly discuss and agree upon the roles each person will fulfill within the organization. Advisors and students may use this exercise to clarify expectations and to determine the sharing of responsibilities.

### ***RECRUITMENT AND RETENTION OF MEMBERS***

**Whose job is it to:**

**Circle One:**

- | 1. Collect a list of potential members and contact them regarding meetings and activities?                           | Advisor | Student | Both |
|--|---------|---------|------|
| 2. Promote the organization through informational sessions, the student newspaper, and letters to potential members? | Advisor | Student | Both |
| 3. See that additional members are recruited to carry out organizational programs and activities?                    | Advisor | Student | Both |
| 4. Properly orient new members to the organization?  | Advisor | Student | Both |
| 5. Train new members as they take on leadership roles within the organization?                                       | Advisor | Student | Both |

### ***MEETING PREPARATION***

- |  |         |         |      |
|--|---------|---------|------|
| 1. Select the date, time, and place for the meeting?   | Advisor | Student | Both |
| 2. Handle arrangements for the meeting, such as room set-up, refreshments, and necessary materials or equipment? | Advisor | Student | Both |
| 3. Prepare the agenda for the meeting?   | Advisor | Student | Both |
| 4. Send out a meeting reminder and a copy of the agenda?   | Advisor | Student | Both |
| 5. Invite other members of the campus or community?  | Advisor | Student | Both |
| 6. Make arrangements for any special presentations (videos, Speeches, etc.)?                                     | Advisor | Student | Both |
| 7. Provide the background information or a situational analysis on a particular decision or agenda item?         | Advisor | Student | Both |

### ***CONDUCTING MEETINGS***

- |  |         |         |      |
|--|---------|---------|------|
| 1. Provide the organization's policy perspective or position | Advisor | Student | Both |
|--|---------|---------|------|

on certain issues during the meeting?

2.	Provide the University's policy position on certain issues?	Advisor	Student	Both
3.	Delegate responsibilities and tasks to members?	Advisor	Student	Both
4.	Conduct the meeting and maintain order during discussion?	Advisor	Student	Both
5.	Reveal facts, share past experiences, or point out alternative approaches when members are making decisions?	Advisor	Student	Both
6.	Take minutes and see that they are typed and distributed?	Advisor	Student	Both
7.	Generate new ideas for ongoing or new programs?	Advisor	Student	Both
8.	Settle disagreements between members during the meeting?	Advisor	Student	Both

### ***FOLLOW-UP TO MEETINGS***

1	Mail out the minutes to members along with any additional reference materials?	Advisor	Student	Both
2.	Write and send thank-you letters?	Advisor	Student	Both
3.	Follow-up with committee chairs and event organizers?	Advisor	Student	Both
4.	Handle the routine business of carrying out program plans?	Advisor	Student	Both

### ***PROBLEM SOLVING***

1.	Confront members not fulfilling delegated responsibility?	Advisor	Student	Both
2.	Solve problems or conflicts involving members?	Advisor	Student	Both
3.	Solve problems or conflicts involving staff?	Advisor	Student	Both
4.	Answer questions and clarify procedures for members?	Advisor	Student	Both
5.	Answer difficult questions or address criticisms about organizational activities and decisions about the community?	Advisor	Student	Both
6.	Release sensitive information to the media?	Advisor	Student	Both
7.	Make budgetary decisions?	Advisor	Student	Both