University of South Florida
St. Petersburg

The SOURCE
For All Things Student Orgs

Student Organization Handbook
2019-2020

CONTENTS

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Welcome from the Office of Leadership and Student Organizations

Dear Student Leaders:

Student Organizations are an integral part of campus life and student engagement at the University of South Florida St. Petersburg. The student organization experience provides an outlet to explore and engage your passion, connect with peers, and build relationships, as well as grow into a strong leader and change agent. During your time at USFSP, we encourage you to commit to your student organization; to take pride in your ability to make significant impact and truly serve your campus and surrounding community by sharing your gifts, talents, and dreams.

The Office of Leadership and Student Organizations provides opportunities and consistent support to help you start, enhance, and/or sustain your student organization. It is our hope that you take full advantage of the opportunities we provide and leave your student organization better than you found it…or start a new organization and leave a legacy! Ultimately the success of your student organization is you and your fellow members' responsibility. In partnership, the LSO staff is ready and willing to help guide you, advise you, and support you every step of the way.

We encourage you to be an active participant in the student organization community by acquiring knowledge of this handbook and be a role model for our community.

Please do not hesitate to reach out for advice or questions. We are here to support you and your organization.

Sincerely,
Leadership and Student Organizations Staff
LSO@usfsp.edu

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Starting and Maintaining a Student Organization

What is a Student Organization?

A student organization is defined as a group of currently enrolled University of South Florida St. Petersburg student who unite to promote a common interest. Student organizations are student-initiated and student-run. They may include other members of the University community such as alumni, faculty, staff, and administrators as long as 51% of the membership are currently enrolled students. Only currently enrolled students can serve as officers or vote on organizational matters. USFSP recognizes the vital contributions that student organizations make to the quality of life on campus; however, recognition as a USFSP organization is not to be interpreted as an endorsement, approval, or reflection of the mission, purpose, and/or activities of USFSP or its affiliates.

If it is alleged that a registered student organization or its members have failed to comply with University policies or procedures, the University may conduct an investigation and render sanctions as it deems necessary. Failure to comply with University policies and procedures may result in a variety of penalties, including but not limited to suspension or the revocation of recognition. A student organization that is suspended or no longer recognized by the University loses all privileges and benefits granted to student organizations.

Organization Categories

During the registration process, organizations can select how they would like to be categorized. Organization Categories are used as a searching aid when students are looking for organizations to participate in. Organizations can select from the following categories:

- **Academic/Professional:** Organizations designed for students interested in a particular career or academic field who want to establish networks and further develop their skills in that area.

- **Campus Departments/Offices:** USFSP campus departments or offices.

- **Event Programming:** Organizations whose primary mission is to program on campus.

- **Graduate/Alumni:** Organizations designed specifically to meet the needs of graduate students in their specific areas of study or interest or alumni of USFSP.

- **Honor Society:** Local and national honor societies that provide service and/or leadership opportunities and recognition for students with academic honors.

- **Interfaith/Spiritual:** Organizations that focus on the interfaith backgrounds or spiritual wellness of their members.

- **Media:** Organizations serve to create various forms of media for the campus to read, watch, or listen to.

- **Multicultural:** Organizations focused on providing support and fostering community within the various cultures, races, religions, and orientations represented among the student body.

- **Performing:** Organizations whose main purpose is to entertain and educate through dance, vocal, and other performances.

- **Political:** Student groups that encourage expression, debate, and support of political issues, views, and/or candidates.

- **Recreational/Sports Club:** Groups that encourage participation in and promotion of team sports, physical fitness, health and wellness, as well as leisure and special interest activities.

- **Service:** Organizations that provide volunteer opportunities for civic-minded students eager to serve the campus and/or community.

- **Social Justice:** Organizations whose mission focuses beyond the scope of recognizing systemic oppression and works to reconstruct society to remove all inequities.

- **Special Interest:** Organizations that exist to enhance campus life and to provide support to students through a variety of programs and events.

- **Student Government:** The governing body of students.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Information Required for Online Registration

- ☐ Organization Profile
    - o Name (Please do not put USFSP or USF in front of name)
    - o Abbreviated Name (nickname)
    - o Address
    - o Email address
    - o Phone Number
    - o Social Media Links
- ☐ Organization Profile Picture
- ☐ Organization Interests
- ☐ Organization Categories
- ☐ Constitution
- ☐ Roster
    - o Please note we ask that all organizations have at least 6 members
- ☐ Mailbox Request
- ☐ Student Organization Closet Storage Request
- ☐ Additional Fields
    - o Meeting Day
    - o Meeting Time
    - o Meeting Location
    - o Will your organization's activities require or involve any of the following?
        - ▪ Specialized Certification
        - ▪ Fundraising Initiatives
        - ▪ Off Campus Bank Account
    - o If you currently have an off campus bank account, where do you bank?
    - o USFSP Student Handbook Agreement
    - o Hazing Policy Agreement
    - o The Source Supplies Questionnaire

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Benefits and Responsibilities

Responsibilities

- Register annually with the Office of Leadership and Student Organizations. Registration dates change each year and will be shared via email to all student organizations.
- Maintain at all times at least six (6) current students who are participants within the group.
- Maintain an updated organization constitution. Information regarding the requirements for the organization's constitution is available later in this handbook.
- Select four (4) officers including a President, Vice President, Treasurer, Secretary.
- Have a clear and unique purpose that does not duplicate an existing student organization.

Benefits

- Meeting and event space in accordance with University space reservation procedures.
- Use of University names at the end of an organization's name. *NOTE: Use of the University name does not constitute a grant of authority to the student organization or to any of the members. It also does not allow members to represent themselves as having authority to act as an agent for, to speak on behalf of, or to obligate USFSP contractually. The use of the University's tax exempt status is not included in this benefit.*
- Grant funding available by SG via the Appropriations Committee. Funds include event, travel, publication, and operational opportunities.
- Storage space in the Student Organization Closet in the SLC is available for student organizations.
- The Source has a host of resources available to organizations including computers, meeting spaces, supplies, and more. The Source is located in Suite 1800 within the Student Life Center.
- Assistance from Leadership and Student Organizations staff including leadership training, educational workshops, general organization advising, event planning, publicity, and reference materials.
- Listings in organization directories on PeteSync.
- Participation options in University events such as Get on Board Day, Homecoming, USFSP Week (as availability permits).

Organization Advisors

It is a requirement that all USFSP student organizations have a USFSP faculty or staff advisor. Advisors are extremely important in helping keep organizations on track! It is important to find an advisor that you have a close relationship with or one that has an active interest in the student organization you are starting. Ask faculty or staff members you are close with; odds are that if they cannot do it, they know of someone who can. For more information about selecting an advisor, please see a Leadership and Student Organizations staff member.

Affiliate Advisors

It is common that organizations who are national have off campus advisors, known as "Affiliate Advisors." Please make LSO aware of your affiliate advisors.

Advisor Liability

Advisors to student organizations accept an added responsibility. The type of liability or risk for the advisor varies greatly depending upon the type of organization. What follows are some suggestions to assist with an advisor's responsibility regarding liability issues or concerns:

• Try to anticipate risks which may arise out of any decision or situation and then discuss with the officers what they can do to minimize risks. Regardless of what organization or activity is involved, there will always be an opportunity for something out of the ordinary to happen. However, if decisions are made consistently and in good faith, and reasonable precautions are taken, then the risk involved can be minimized. Please contact the Leadership and Student Organizations staff, as they can work with the University Office of Legal Affairs if questions arise.

• It is important to be aware of University policies and regulations as they affect student organizations. The USFSP Office of General Counsel and the Student Organization Handbook are great sources for University rules and regulations. The staff members in the Office of Leadership and Student Organizations can also serve as resources for you if you have specific concerns or questions.

• Advisors should never enter into contracts on behalf of a student organization.

Student Organization Mailboxes

All organizations can request a mailbox which will be located in The Source (SLC 1800). LSO's Leadership Navigators will sort mail on a daily basis and it is the organization's responsibility to come collect mail from the mailbox.

The Source

The Source is located in SLC 1800 and is dedicated to student organization leaders and members for handling the day-to-day operations of your group. The resource space is designed to give you access to MAC computers with the latest design software, a Cricut machine, helium tank, and a laminator. In addition, you will have access to a free printing station. Art supplies are provided free to organizations.

Information you should know about The Source:

• The SORC is accessible to all members of registered student organizations. You do not need to reserve the space.

• The resources are free; however, we ask that you do not take items/supplies out of the Source so that they are available to everyone at all times!

• Materials in the Source are for student organization use only - materials are not for personal use or class projects.

Student Organization Storage Closet

Storage is available for student organizations in the SLC Student Organization Storage Closet. Storage spaces can be reserved through PeteSync in the LSO Portal.

Get on Board Day

Get on Board Day happens twice a year-at the beginning of both the fall and spring semesters. Get on Board Day is open to the entire campus community and provide an opportunity for the student body to connect with registered organizations at USFSP. Student organization members staff tables where they can recruit new members and distribute information about their organization. Please see an LSO staff member for more information.

Highly Functioning Organizations

In order to maintain an organization's active status, organizations are required to complete the following tasks each year:

- ✓ Register PeteSync portal by due date each year
  - o Registration of PeteSync portal includes updating the roster, Constitution is reviewed and re-uploaded into the PeteSync portal, Organization's leadership is updated under "Positions"
- ✓ Organization is represented at Get on Board Day and Orientation Resource Fairs
- ✓ Organization is represented at the Council of Club Presidents meetings
- ✓ Organization is represented at the Student Organizations Conference
- ✓ Organization is represented at least two (2) LSO training sessions per academic year
- ✓ Organization does not receive more than three (3) write ups from the Office of Student Centers and Events per semester

If an organization does not meet the required standards to keep the active status, they may face the following:

- ✓ Organization will not be able to reserve space on campus for a certain time period
- ✓ Organization will not be able to request funds from Student Government
- ✓ Organization will be placed on probation by LSO which means organization might have additional required trainings or meetings

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Trainings

Trainings are presented throughout the year to help strengthen student organizations. The trainings are for any student leader, member, or advisor involved with a registered student organization. A current schedule of trainings can be found on PeteSync.

The Rocky's Leadership Awards

All organizations are encouraged to apply for a Rocky Award for a chance to enter into the Student Organization Hall of Fame located in the SLC Atrium.

New Student Organization Checklist

1. In PeteSync, browse current organizations to ensure the organization you wish to start doesn't already exist.
2. If there is no organization similar to what you would like to start, you will need three (3) things to establish a new organization:
   a. 6 Members (President, Vice President, Secretary, and Treasurer must be decided)
   b. A USFSP Advisor (Any USFSP Staff, Faculty, Administrator, or Graduate Assistant, but they must be affiliated with USFSP)
   c. A written and voted upon Constitution (Sample constitution is located in the LSO Portal)
3. Once you've done the above tasks, log into PeteSync.com and click on "Register New Organization"—complete the form. Please note that information you provide is publically viewable. The more information you provide the better! This provides opportunities for the students with similar interests to join your organization and get involved on campus.
4. After you submit the new student organization form, LSO will receive your information and send the completed Constitution to Student Government for their review and approval. At least one member of your organization (preferably an executive board member) will attend a one on one informational meeting with a Leadership Navigator (LSO Student Assistant) which is the New Student Organization Meeting. During this meeting, the Leadership Navigator will also review EMS (Event Management System). *Please note that whomever attends the EMS training will be the only one who can submit room reservations on behalf of your organization.*
5. Once LSO receives the approval from SG about your organization's constitution, we will make your organization "Active" in PeteSync. To keep the active status, your organization will need to complete the "Highly Functioning Organization" yearly standards which can be found on page 10 of this handbook.

Student Organization Finances

Student Activity Fee Funding Eligibility and Sources

Any student organization that does not require members to pay dues are eligible to request Student Activity fees for their organization.

Types of SG Grants and Funding

There are two types of funding available through Student Government: Special Funding and Annual Budgets. Special Funding is funding for a specific event, program, or item and multiple requests can be submitted throughout the fiscal year. Annual Budgets are granted during the Spring semester to any organization who requests one.

Student Government Finance Code

Chapter 800:

Activity and Service Fees

800.1 "The purpose of Activity & Service Fees is to provide University of South Florida St. Petersburg students the opportunity to interact and participate in various campus projects, programs, and services that are intended to enhance mind, body, spirit and the overall University experience."

800.2 All uses of Activity and Service (A&S) Fee money shall be subject to, and governed by, the Constitution and Statutes of the Student Government of the University of South Florida St. Petersburg, and where applicable state and federal laws, the rules and regulations of the University of South Florida, and the University Board of Trustees.

800.3 The Student Government Senate will allocate A&S money by strictly following the purpose as set forth in Statutes. Any variation from this purpose will be considered a misappropriation of funds and will not be allowed. A 3/4ths vote of Senate will be required to change the purpose as set forth in Statutes.

Chapter 801:

Definitions of Terms for the Finance Code

801.1 *Admission:* The price paid for entrance to an event.

801.2 *Agency:* An administrative division of the Executive Branch created to provide support, entertainment, and/or education for a particular select interest group of the University of South Florida St. Petersburg whether it be racial, ethnic, academic, or philosophical in nature.

801.*3 Annual Budget:* A yearly process that culminates in the budget allocations for all Activity and Service fee entities.

801.4 *Appeals:* Disagreement with a ruling or decision.

801.5 *Audit:* To conduct an official financial examination of any group or entity.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

801.6 *Budget:* A financial plan of revenues and expenditures for programs and services for a given timeframe (July 1 - June 30). A budget includes recurring and nonrecurring funds.

801.7 *Budget Allocation:* The amount of Activity and Service fee revenue allocated to each Activity and Service fee entity.

801.8 *Budget Amendment:* A revision to a previous budget with a majority consent of the Senate Committee on Appropriations.

801.9 *Budget Authority:* The permission granted by law to an agency or department to make commitments to spend funds. It is not the actual expenditure cash.

801.10 *Budget Performance Report:* A comprehensive review by the Chief Financial Officer of Student Government and other relevant authorities on the effectiveness of an entity's budget usage over a fiscal year. The criteria to determine effectiveness shall be approved by the Senate no later than the last meeting of the Spring semester.

801.11 *Business Day:* Shall be defined as being weekdays (Monday through Friday) during academic sessions. Academic Sessions include Spring, Summer, and Fall semesters only.

801.12 *Carry Forward Fund:* Allocated funds not expended by June 30th, which become available for use in the new Fiscal Year.

801.13 *Centralized Budget Transfer Form:* Authorization form for transfers between indexes or between funding categories (operating expenses, OPS wages, salaries, OCO) for centralized indexes. The form requires the signatures of the Appropriations Chair, Chief Financial Officer, Student Body President, and the Senate President.

801.14 *Centralized Entity:* An A&S Fee funded entity whose budget is managed by Student Life.

801.15 *Department:* A budgetary subunit within the University.

801.16 *Entity:* Any department, agency, or student organization partially or fully funded by A&S Fees. Entity also applies to the Department of Student Life and staff and SG Officers.

801.17 *Event Evaluation Form:* The form to be filled out by Senators when evaluating an A&S funded organization/club event.

801.18 *Expenditure:* An obligation to make payments incurred in an accounting period. Expenditures shall not exceed the amount budgeted under each classification of accounts for each fund and the total amount of the budget.

801.19 *Expenditures:* The creation or incurring of a legal obligation to disburse money.

801.20 *Expenditure Request Form (ERFs):* A form required to be filled by all Activity and Service Fee entities before expenditures are completed.

801.21 *Fiscal Year:* The financial year of the Student Government of the University of South Florida St. Petersburg shall be from July 1 to June 30.

801.22 *Frozen Account:* An account that has been frozen by the Student Government Association and may not expend any funds until the account has been unfrozen. Account are frozen due to violations outlined in Chapter 802 of these statutes.

801.23 *Funds:* Any Activity and Service fee revenue.

801.24 *Fund Balance:* An accumulation of money generated through excess tuition hours and unexpended budget allocations. The Fund Balance includes the Cash Flow Reserve, and the General Reserve.

801.25 *General Equipment Reserve:* The portion of the Fund Balance after all other reserves and restrictions are met.

801.26 *Grant Requests:* Money requested throughout the fiscal year by Registered Student Organizations, Student Government Branches and Agencies, or Activity and Service Fee funded entities for events, projects, or equipment purchases not previously budgeted.

801.27 *Networking:* The exchange of information or services among individuals, groups, or institutions for the sole purpose of acquiring any kind of career.

801.28 *Operating Cash Flow Reserve*: The portion of the Fund Balance designated in the amount of at least $100,000 at the beginning of the fiscal year.

801.29 *Operating Capital Outlay (OCO):* An appropriation category for the purchase of equipment, fixtures and other tangible personal property of a non-consumable and non-expendable nature, the value or cost of which is $1,000 or more and the normal expected life of which is one (1) year or more, and hardback bound books that are circulated to students or the general public, the value or cost of which is $25 or more, and hardback-covered bound books, the value or cost of which is $250 or more.

801.30 *Operating Expenses:* Day to day expenses, such as travel and payroll.

801.31 Other Personal Services (OPS): An expenditure category which includes the compensation for services rendered by a person who is not a regular or full-time employee filling an established position.

801.32 *Personal Items:* Any item deemed personal by a supermajority vote of the Committee on Special Funding.

801.33 *Prize:* An award for a winner; something that is given to the winner of a contest, competition, and/or raffle.

801.34 *Proviso:* Language that qualifies or restricts a specific appropriation item(s) and which can be logically and directly related to the specific appropriation.

801.35 *Reallocation:* A change to the original purpose of funds. Funds are then allocated again.

801.36 *Registered Student Organization (RSO):* A student club or organization at the University of South Florida St. Petersburg that is registered with Office of Leadership and Student Organizations. RSOs must comply with Chapter 803 in order to be eligible to receive A&S Fee funding.

801.37 *Salary Reserve:* The portion of the Activity & Service Fee Budget that is reserved to pay for salary increases in the event that the Federal or State minimum wage increases during a fiscal year.

801.38 *Sports Competition:* An activity involving physical extortion and skill in which an individual or team competes against others.

801.39 *Standard Contracts:* Contracts that have been approved for use by the University.

801.40 *Sweep:* An automated process where unexpended funds are moved into the Reserve account. A power granted that allows, under criteria specified in Title VIII, allocated funds to be swept back into its former account.

801.41 *Transfers:* Any monetary transfer within an entity for the purpose of moving funds to other categories, or for the purpose of moving funds to other entities. All transfers of Activity and Service fee funds must be requested via the Centralized Budget Transfer Form.

801.42 *Travel Requests:* Money requested throughout the fiscal year by Registered Student Organizations or individual A&S Fee paying students for conference travel, which is not previously budgeted.

801.43 *Vendor:* A person or firm who contracts to sell commodities or contractual services to the University of South Florida Saint Petersburg System.

801.44 *Violation:* Any action taken by a funded entity that is considered to be a criminal offense, fraudulent in nature, or in direct violation of University fiscal rules and regulations.

Chapter 802:

Activity and Service Fee General Regulations and Guidelines

802.1 All monies deposited into A&S Fee accounts shall be subject to the rules and regulations of the University of South Florida St. Petersburg Student Government and the State of Florida.

802.2 All capital outlay purchases not previously outlined in the A&S funded entity's respective budget must be approved by the Student Body President.

802.3 All one time expenditures over twenty thousand (20,000) dollars (including, but not limited to, contractual services, capital outlay, production costs or products) must receive no less than three (3) quotes from three (3) different vendors or sources. All entities must purchase the quote that is the most economical, but not necessarily the least expensive.

802.4 All one time expenditures requiring a quote (of over twenty thousand [$20,000] dollars) must be approved by the Student Body President. All quotes must be presented alongside with the expenditure request.

802.5 Any A&S account may be frozen by a simple majority vote of the Senate Committee on Appropriations, the Senate or the Student Body President in conjunction with the CFO for a period of five (5) business days.

> 802.5.1 After the period of five (5) days, the frozen A&S account shall return to Senate at the next Senate General Assembly for reconsideration.

802.6 Student organization accounts may be frozen by the Senate, with the advice of the Student Body President, for an extended period of time beyond five (5) business days.

802.7 Any A&S account may be frozen for an indefinite time by the Student Senate, after consultation with the Student Body President and CFO, by a 3/4ths vote at a regular meeting.

802.8 Any A&S account may be unfrozen by the Senate with a simple majority at any regular meeting.

> 802.8.1 Any A&S account may be unfrozen by the Senate Committee on Appropriations by a supermajority vote at any regular meeting.

802.9 A&S accounts may only be frozen for the following reasons:

> 802.9.1 Violation of Finance Code

802.9.2 Violation of Senate Committee on Appropriations proviso

802.9.3 Violation of University Regulations or Policy

802.9.4 Violation of Student Body Constitution or Student Government Statutes

802.9.5 Violation of Florida Statutes

802.9.6 Fiscal irresponsibility as determined by definition

802.9.7 Failure to fulfill duties outlined in the Student Organization Handbook

802.10 A&S funded entities may have future funding suspended under the same outlines for account freezing specified earlier in Chapter 802.

802.11 All A&S Fee funds must be spent for the direct benefit of the Student Body.

802.12 All events or services funded by A&S fees must be opened to all students, free of admission, dues or service charges, except for purposes further outlined in Title VIII.

802.13 All A&S Fee funded events shall be held on campus unless reasonable accommodations have been made to assist in the transportation of students to off campus events. No Student Organization may hold an A&S Fee funded event off campus unless said Student Organization has received recognition from the Senate Committee on Special Funding.

802.13.1 On campus shall be defined as anywhere on the USF St. Petersburg Campus or any venue where a USFSP sponsored event is being held.

802.14 All individual students seeking to travel must submit a grant request to be considered for funding.

802.14.1 Reason for individual student travel request must be academically relevant to current coursework or enrolled graduate or doctoral studies.

804.4.3 Total travel expenses for individuals: Maximum of $500 per fiscal year for international travel, $350 per fiscal year for domestic travel.

804.4.3.1 Individuals may only receive funding for one travel request per fiscal year.

804.4.3.2 Travel shall be defined as lodging, registration, and transportation excluding personal or rental vehicles.

804.4.2.3 Rooms: $50.00 per night

804.4.2.4 Registration: $200.00 per conference

804.4.2.5 Upon returning from travel, student must give presentation on experience, including what was gained or learned and how this will be applied in future academic or professional career.

802.15 Budget allocations shall be appropriated in accordance within categories used by university software for finance reporting.

802.16 A&S Fees should be spent in accordance with a particular entity's budget allocation as approved by the Student Government Senate.

802.16.1 Any budget transfer request must be approved by the Senate Committee on Appropriations.

802.17 Any monies collected in conjunction with charging at an A&S funded service held or conducted by a student organization, up to the initial A&S cost of the event, must be deposited into the organization's respective A&S account. All funds must be deposited in the form of a bill of credit.

802.18 All A&S property must be accounted for by the Office of Budget Management and must be housed in a location on campus. All property purchased by A&S Fee funds are the sole property of the University of South Florida St. Petersburg Student Government and the State of Florida.

802.18.1 The use of all A&S property shall be in accordance with Student Government Statutes and Senate Committee on Appropriations policy and procedure.

802.19 The Senate Committee on Appropriations shall review Title VIII following passage of the Annual Budget.

802.19.1 The Senate Committee on Appropriations, in conjunction with the CFO, shall submit a comprehensive review on the Annual Budget for the prior fiscal year by the First General Assembly meeting of the Fall semester.

802.20 All A&S funded departments of Student Affairs and the Student Government will, on a quarterly basis, submit a budget performance report the Senate Committee on Appropriations, as well as by the Senate General Assembly upon request. This report shall contain detailed expenditures, transfers and generated revenues and shall be due within five days of the closing of the University quarter.

802.20.1 Failure to submit this budget performance report to the Senate Committee on Appropriations may result in penalization for an A&S entity's future budget.

Chapter 803:

Funding Eligibility

803.1 A&S Fee money shall not be allocated to entities and/or organizations that discriminate based on major, race, color, marital status, sex, religion, national origin, sexual orientation, disability, or age, as provided by law; consistent with University Policy.

803.2 No entity which requires a loyalty oath for application of membership, oral or written, professing any particular belief, creed, or ideology, shall be eligible to apply for A&S fee funding. A&S fee money shall not directly be allocated to entities which are not within the Division of Student Affairs and Enrollment Services, Student Government, or a student organization. Any request from an entity outside Student Affairs must be made through the Student Government Special Projects account, should it exist.

803.3 No entity that requires mandatory dues for membership (local or national) shall be eligible to apply for A&S Fee funding.

803.4 No student organization that withholds or denies membership privileges for any enrolled student shall be eligible to apply for A&S Fee funding.

803.5 Any organization seeking to request A&S funding must have a Constitution approved by the Office of Leadership and Student Organizations prior to being allowed to request or apply for funds.

803.5.1 Constitutions may only be denied due to reasons listed in Chapter 803 or violations of University policy.

803.5.2 Clubs must be active as declared by the Office of Leadership and Student Organizations guidelines.

803.5.3 The Senate Committee on Appropriations, the Senate Committee on Special Funding, the Senate Committee on University Research or the CFO may request a club's constitution to review their eligibility for A&S funds.

803.5.4 The Senate Committee on University Research shall review the A&S funding eligibility for clubs and organizations

> 803.5.4.1 Student organization constitutions will be used, in part, to determine eligibility.

> 803.5.4.2 Student organization card swipe data will be used, in part, to determine eligibility.

803.5.5 Any changes made to 803.5 will not take effect until Spring semester

> 803.5.1 At the start of next semester 803.5.5 and its subsections will be deleted next semester.

803.6 The total number of students on the list must be at least five (5).

803.6.1 All financial officers are responsible for maintaining their own financial records of their respective student organization's activities.

803.7 In order to be a registered organization, all A&S fee funded student organizations must have an active membership that contains 100% currently USFSP enrolled students. Non-USFSP students will not be considered part of the active membership. As inactive members, non-USFSP students cannot vote, hold office, or direct the activities of the organization.

803.9 The CFO shall meet with at least one (1) financial officer of each club on a once per semester basis, or as needed, and discuss the rules and guidelines of A&S Fee funds.

Chapter 804:

Activity and Service Fee Proviso Language

804.1 The following is the Activity and Service (A&S) Fee Proviso.

804.2 These rules and regulations apply for all A&S funded programs, services and activities:

804.2.1 All A&S funded programs, services and activities that benefit the Student Body must be submitted with detailed justification for each item.

804.2.2 All A&S funded events shall be opened to all students at no charge, with the exception of Student Government sponsored concerts, with the advice and consent of the Student Government Senate.

> 804.2.2.1 Student Government funded campus-wide activities need the sponsorship of a Student Government branch or agency in order to be considered a Student Government sponsored event.

> 804.2.2.2 Admission will not be charged to any USFSP student at any A&S fee funded student organization event, however non-students can be charged with approval from the Senate Committee on Appropriations. All funds raised from an A&S funded event must be deposited into the organization's A&S account.

804.2.3 The Senate Committee on Special Funding has the discretion to deny grant requests with the proper justification.

804.2.3.1 The Senate Committee on Special Funding is not obligated to fully fund any A&S Fee eligible program, service or activity.

804.2.3.2 All student clubs/organizations are encouraged to seek outside financial support.

804.2.4 Any deviation from proviso must be for exceptional circumstances and must be brought to the Senate floor and approved with a super-majority vote.

804.2.4.1 The CFO or the Chair of the Committee on Special Funding will present the exceptional circumstances, as well as justification for deviating from proviso on the senate floor.

804.2.5 There will be a one (1) year probationary period for any new position funded by A&S fees. SG has the option to provide continual financial support or to defund the position.

804.2.6 In case of university contracts, proviso will not apply.

804.3 Rules and regulations for Student Government Branches, entities, and agencies:

804.3.1 The following items can be funded to a maximum amount per year by Activity and Service fee monies as defined in this chapter:

804.3.1.1 Student Government Banquet: $12.00 per student in attendance.

804.3.1.2 Name tags for students: $7.00 per name tag.

804.3.1.3 Business cards: maximum one thousand (1000) per employee per year.

804.4 Such items can be funded by the Senate Committee on Appropriations and the Committee on Special Funding:

804.4.1 With proper justification and at no more than the maximum amounts listed below:

804.4.1.1 Food: $10.00 per student in attendance per event.

804.4.1.2 Banners: $200.00 per year

804.4.1.3 End of semester banquet: $12.00 per student in attendance (An end of the semester banquet shall not be funded more than once per semester).

804.4.2 Total travel expenses for each club: Maximum of $1,600.00 per fiscal year, per club/organization.

804.4.2.1 Travel shall be defined as lodging, registration, and transportation

804.4.2.2 Any travel expense exceeding $1,000 must have multiple quotes and/or estimates

804.4.2.3 Any travel expense exceeding $1,000 per year must have a supermajority to pass the Senate at General Assembly

804.4.2.4 Car rental: $60.00 per day (exclusive of total gas receipts)

804.4.2.5 Rooms: $75.00 per person, per night

804.4.2.6 Registration: $200.00 per student per conference

804.4.2.7 Personal vehicles: As defined by state statute or University Policy

804.4.2.7.1 Personal vehicles are to be reimbursed at the current Florida Statutory Rate.

804.4.2.8 Van rental: $250.00 per day, per van

804.4.2.9 Bus rental: $1,500 per event

804.4.2.10 Food for travel may be provided as defined by state statutes or University Policy.

804.4.3 The following items can be funded to a maximum amount listed, or may be funded to exceed that amount with the approval of the Senate Committee on Appropriations and the Committee on Special Funding:

804.4.3.1 Costume rental/purchase: $300.00 per rental/purchase.

804.4.3.2 Trophies/plaques: $100.00 each

804.4.3.3 Tee Shirts: $10.00 each

804.4.3.4 Long Sleeve Shirts: $14.00 each

804.4.3.4 Polo shirts: $20.00 each

804.4.3.6 Hoodies: $25.00 each

804.4.4 All USFSP students are entitled to A&S funded materials on a "first come first served" basis.

804.5 The following items shall not be funded by A&S fee Monies:

804.5.1 Awards of cash value, such as gift cards

804.5.2 Fundraising costs

804.5.2.1 With the exception when the full costs are recovered at the conclusion of such an event.

804.5.3 Personal items

804.5.3.1 With the exception of items deemed necessary and approved by the Senate Committee on Special Funding.

804.5.4 Individual membership

804.5.4.1 With the exception of items deemed necessary and approved by the Senate Committee on Special Funding.

804.5.5 Any controlled substances

804.5.7 Travel for the sole purposes of "job search/career fair/networking" is strictly prohibited.

804.5.8 No A&S fee funds shall be used on or in behalf of any political campaign.

804.5.8.1 Political campaigns shall be defined as any person or party running for any position in:

804.5.8.2 Student Government elections/any campus election directly from Student Government

804.5.8.2.1 A&S funded services can be used for the purpose of campaigning in Student Government/ campus elections

804.5.8.3 Local elections

804.5.8.4 State elections

804.5.8.5 National elections

804.5.9 A&S fees shall not be spent to directly benefit non-USF students, excluding the use of A&S monies for the following purposes as defined in this chapter:

804.5.9.1 Recognition of USFSP faculty, staff, advisor's, and/or coaches.

804.5.9.2 Speaker fees and/or honorariums

Chapter 805:

Annual Activity and Service Fee Budget Procedure

805.1 The submission deadline for budget requests from A&S fee funded entities shall be the first Friday in February.

805.2 The Student Body President shall formally communicate via e-mail with administration by the last Friday in January requesting the preliminary projected A&S fee revenues for the next fiscal year and shall inform administration of SG statutory deadlines.

805.2.1 The President shall include the Senate Appropriations Chair on this formal communication.

805.3 The CFO's Official Executive Budget Proposal submission deadlines shall be:

805.3.1 To the Senate Committee on Appropriations ten business days after the first Friday in February.

805.3.2 To the Senate General Assembly within one academic week of the submission to the Senate Committee on Appropriations.

805.4 The Senate Committee on Appropriations shall report their recommendations on the Official Executive Budget Proposal to the Student Government Senate General Assembly in the form of a bill within fifteen business days of the CFO's budget submission to General Assembly.

805.5 If the budget is not approved by the Student Government Senate, the CFO, under the direction of the Student Body President, will revise the budget taking into consideration the concerns of the senate. The CFO will re-present the revised budget, in the form of a bill, to the senate.

805.6 The approved budget shall be forwarded to the Student Body President who shall approve or veto the budget within ten business days.

805.6.1 The Student Government Senate shall have the power to override a presidential veto by a supermajority vote.

805.7 The approved budget shall be submitted to the Regional Chancellor through the Division of Student Affairs within ten (10) business days of passage. The Regional Chancellor shall approve or veto the budget within fifteen business days of being presented the budget.

805.7.1 If the Regional Chancellor vetoes the budget, the Senate President shall call a special Senate Committee on Appropriations meeting to act upon areas of disagreement. A new budget must be approved and re-submitted within fifteen business days of being returned by the Regional Chancellor.

805.7.2 The new budget shall be approved in the special Senate Committee on Appropriations meeting.

805.7.3 If the new budget is approved by the Senate Committee on Appropriations, the Senate President shall call a special General Assembly meeting, or add the new budget to the agenda at the next General Assembly meeting, to vote upon the new budget.

805.8 Should the budget be vetoed by either the President or the Chancellor after the last Spring meeting of the Senate General Assembly, or not be approved by the Senate Committee on Appropriations: A committee chaired by the Chief Justice and comprised of the outgoing Chief Financial Officer, Senate Appropriations Chair, President and Senate President as well as the President Elect and Senate President Elect shall form and pass the annual budget with a simple majority vote no later than 11:59 p.m. on the date of Commencement. In the event of a tie the Chief Justice will hold the tie-breaking vote.

805.9 Based on regulation set by the Board of Trustees each USF campus Student Government is responsible for establishing viewpoint neutrality guidelines.

805.9.1 All Senators shall sign and complete a Conflict of Interest and Viewpoint Neutrality Agreement that will be kept on file and in effect during each Senator's term.

805.9.2 Violation of the agreement shall result in consequences levied by the Senate.

805.9.2.1 False, out of date or misleading information shall also be considered a Violation.

805.10 The following shall be temporary statutory lines regarding balancing the Student Government Budget:

805.10.1 The Senate and the Student Body President shall ensure that Student Government Annual Budget for Fiscal Year '17-18' allocation is equal to, or less than, at least 106% of the estimate given by the Budget Direct at USF.

805.10.3 The Senate and the Student Body President shall ensure that Student Government Annual Budget for Fiscal Year '18-19' allocation is equal to, or less than, at least 104% of the estimate given by the Budget Direct at USF.

805.10.4 The Senate and the Student Body President shall ensure that Student Government Annual Budget for Fiscal Year '19-20' allocation is equal to, or less than, at least 102% of the estimate given by the Budget Direct at USF.

805.10.5 The Senate and the Student Body President shall ensure that Student Government Annual Budget for Fiscal Year '20-21' allocation is equal to, or less than, at least 100% of the estimate given by the Budget Direct at USF.

805.10.6 If no current budget estimate is available to the Student Government Senate during the time frame of passing the Annual Budget for that fiscal year, then they shall use the previous year's projection.

805.10.7 A supermajority vote is required to change any of the aforementioned percentages.

805.10.8 This section only refers to recurring revenues and expenses.

805.10.8.1 This section shall not be interpreted to include uses of Activity and Service reserve funds.

805.10.9 Upon completion of this plan, 805.10 shall be removed from the Student Government Statutes.

Chapter 807:

Student Club and Organization Budget

807.1 A&S eligible clubs and organizations may request annual funding.

807.2 Annual budgets must be submitted by the First Friday of March to the Student Government CFO and The Senate Committee on Appropriations.

807.3 The total allocation to a club or organization shall not exceed twice the amount they received over the previous fiscal year.

807.3.1 The total amount of a club or organization's budget request shall not exceed three thousand five hundred (3500) dollars.

807.3.2 Clubs and Organizations may request a base budget of two hundred and fifty dollars, regardless if they have spent money in the previous fiscal year.

807.4 The CFO shall send the Chair of Appropriations all club and organization budget requests.

807.4.1 This shall only be done after the club or organization has met with the CFO to discuss their budget request and review their previous year's spending.

807.5 The Senate Committee on Appropriations shall be responsible for reviewing all club and organization budgets.

807.5.1 The Senate Committee on Appropriations shall immediately begin holding hearings after receiving an annual budget request from the CFO.

807.5.2 All approved club and organization budgets shall be added to the Annual Budget.

807.6 The Senate Committee on Appropriations shall review the budgets in a four-step process:

807.6.1 Read through each budget request, noting any exceptions to Proviso.

807.6.2 Contact all and meet with organizations to discuss their budget requests prior to making recommendations concerning their budget using a standardized budget request questionnaire.

807.6.3 Review each budget request as a committee and amend the request according to Proviso and standards, taking into consideration the organization's performance in the past year and the funds available for allocation during the next fiscal year.

807.6.4 Allocate a period of time for requestors to review their allocation and, if necessary, submit an appeal of any cuts to the budget (mock budget).

807.6.4.1 Appeals may be submitted after the mock budget has been sent out to the requestor.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

807.6.4.2 The Appropriations Chair shall allocate five (5) business days for requesters to submit and appeal to the Chair.

807.6.4.3 The Requestor may submit a request for a written or oral appeal.

807.6.4.4 Written appeals shall be sent to the Appropriations Chair.

807.6.4.5 Oral appeals shall be requested and the requestor will meet with a member of Appropriations to hear their appeal.

807.6.4.6 The Senate Committee on Appropriations may review appeals as they are submitted.

807.6.4.7 All appeals shall be reviewed by the Senate Committee on Appropriations.

Chapter 808:

Student Organization Grant Request Procedure

808.1 A grant request will only be made available to a club or organization that meets the eligibility requirements as defined in Title VIII.

808.2 Grant requests will be reviewed and voted on by the Committee on Special Funding.

808.2.1 At least one informed representative from the club or organization requesting said funds must be present at the Senate Committee on Special Funding meetings.

808.3 In addition to serving as an ex-officio member of the Senate Committee on Appropriations and the Committee on Special Funding, the CFO will be responsible for the following procedures:

808.3.1 Verifying the eligibility for A&S funding.

808.3.2 During meetings of the committees, provide committee members with the appropriate information about the club or organization's financial history, overall status and other pertinent information.

808.3.3 Ensuring that each eligible club or organization has access to the appropriate resources.

808.4 Grant requests do not require second readings, and may be voted upon at first reading, unless further specified in Title VIII.

808.4.1 The Committee on Special Funding shall allocate grant and travel requests under $1,000.

808.4.1.1 The Senate Committee on Special Funding shall make recommendations upon grant requests of $1,000.00 or more to the Senate at the next General Assembly

808.5 All club or organization grant requests will be submitted to the Chair of the Senate Committee on Special Funding in paper or digital format.

808.5.1 The grant request process shall be further outlined in the Senate Committee on Special Funding's Standard Operating Procedures.

808.5.1.1 The Senate Committee on Special Funding shall specify, in conjunction with the CFO, deadlines for grant requests.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

808.5.2 If for any reason the grant or travel request was rejected during processing, the CFO will notify the Chair of the Senate Committee on Special Funding.

Chapter 810

Sweeps

810.1 The Senate Committee on Appropriations shall have the authority to sweep unspent club allocations back into the Clubs and Organizations account for reallocation.

  810.1.1 This may only occur pending consultation with affected student Organizations.

810.2 Such sweeps shall occur automatically for clubs and organizations that become inactive.

810.3 The Chief Financial Officer shall have the authority to sweep funds in the case that an ERF has not been filled out within ten (10) academics days, in consultation with the chair of Senate Committee on Appropriations.

Chapter 811:

Fundraising Incentives

811.1 Fundraising incentives are available to A&S fee funded clubs and organizations.

  811.1.1 Funding incentive is defined as a possible match of funds raised at fundraising events.

811.2 The fundraiser must be approved by The Coordinator of Leadership and Student Organizations before the fundraising incentive request can be seen by The Committee on Special Funding.

  811.2.1 Fundraisers must follow University policy to be eligible to file for a funding incentive request.

  811.2.2 The fundraiser must be held in the greater St. Petersburg/Clearwater area.

    811.2.2.1 Fundraiser(s) held online are not eligible for incentive request.

  811.2.3 Approval of fundraiser eligibility may only be obtained-during the semester under which the undraiser has occurred.

811.3 Incentive requests will be reviewed and voted on by The Committee on Special Funding

  811.3.1 The request must be submitted to the chair of The Committee of Special Funding within 48 hours of the next scheduled committee meeting.

  811.3.2 Requests do not require a second reading, and may be voted on in the first reading.

  811.3.3 Fundraising incentive request will only be seen after the fundraiser has occurred.

  811.3.4 The maximum amount clubs and organizations may request to be matched is $250 per event. The funds for fundraising incentive requests will come from the Senate's clubs budget.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

811.3.5 A representative must be present at The Committee on Special Funding to present on the fundraising incentive request.

    811.3.5.1 The presentation must include:

        811.3.5.1.1 Brief synopses of how the fundraiser went

        811.3.5.1.2 Proof of funds raised (bank slip, cash)

811.3.6 Incentive request will be considered passed by a simple majority vote.

811.3.7 The Senate Committee on Special Funding is not obligated to match the amount of funds raised.

    811.3.7.1 If the fundraiser incentive request does not pass then the fundraiser(s) encompassed by the request are no longer eligible for funding match.

811.3.8 The Chair will confirm the funding amount to be allocated by the CFO.

811.3.9 Clubs are restricted to two fundraiser incentive requests per fiscal year.

Chapter 812:

Student Government New Tradition Grant

812.1 The Student Government Senate shall sponsor Student Organizations programs per fiscal year. Each program shall be defined as a Student Government New Tradition.

812.2 The purpose of Student Government New Tradition Grant is to encourage diverse groups of students to collaborate in the creation of new USFSP traditions.

812.3 Senate Committee on Appropriations shall determine the total budget for Student Government New Tradition Grant, not to exceed $10,000. The budget shall be funded as its own separate line item.

    812.3.1 No more than fifty percent (50%) of the money allocated may be spent during the Fall semester and the remainder may be spent during the Spring semester.

812.4 Student Government New Tradition Grant allocations shall be determined by the Senate Committee on Special Funding.

812.5 Any Student Organization may apply for a New Tradition Grant; so long as the event follows the guidelines outlined in general requirements of A&S Fee events.

    812.5.1 Student Government New Tradition Grants shall be subject to the same rules and regulations as set forth by Student Government, including but not limited to Chapter 804 Proviso.

812.6 It is required that an event be sponsored by at least one A&S funded student organization and a minimum of three other student organizations.

812.7 Student Organizations that wish to apply for New Tradition Grants in the Fall must do so no later than the close of business on the last Friday in June and the last Friday of October for the Spring.

812.7.1 Applications shall be made available at least fifteen (15) business days before the aforementioned deadline.

812.8 Each allocation may not exceed $2,000.00

812.9 Event sponsors must use the Student Government logo and list Student Government as an official sponsor on all marketing materials, including but not limited to, all print and digital advertising.

812.10 New Tradition Grant requests shall fall into at least one of the following categories:

812.10.1 School Spirit - Any event that attempts to promote university pride and school spirit.

812.10.2 Professional/Academic Development - Any event of scholastic merit that can pertain to student fields of study or areas of career development.

812.10.3 Diversity - Any event that brings diverse populations together and provides education on one or more cultural groups including, but not limited to, a particular ethnicity, religion, sexual orientation, veteran status, etc.

812.10.4 Visual/Performing Arts - Any event that demonstrates or promotes the fine arts which may include, but is not limited to, a theatrical performance, dance instruction, collaborative mural, etc.

812.11 Any event that does not fall into one of the categories in 810.10 may still be eligible to receive funding if approved by a supermajority (⅔) of the Senate Committee on Special Funding.

Chapter 813:

Sports Club Federation

813.1 The Sport Club Federation (SCF) is the governing body for all sports clubs.

813.1.1 A sports club is a registered student organization that is formed by students motivated by a common interest to participate and compete in a recreational activity. Sport clubs will compete against other institutions at the state or national level and are classified as competitive, recreational, and/or instructional clubs.

813.2 The Office of Leadership and Student Organizations shall be responsible for classifying clubs under the purview of the Sports Club Federation.

813.2.1 The Office of Leadership and Student Organizations shall make the Student Body President, Senate President, Chief Financial Officer the Senate Committee on Appropriations Chair, and the Senate Committee on Special Funding Chair aware of clubs classified under the purview of the Sports Club Federation.

813.3 Sport clubs must meet all A&S fee eligibility guidelines in order to apply for funding.

813.3.1 Sport clubs shall have their Constitutions approved by the Senate Committee on University, Community and, Government Affairs.

813.4 Clubs which are eligible for both A&S funding and membership in the Sports Club Federation shall not apply for funding directly from Student Government.

813.4.1 Under extenuating circumstances clubs in the Sports Club Federation may apply for A&S funding from Student Government in the Senate Committee on Special Funding with a supermajority vote.

813.5 Funding in the Sports Club Federation will follow the funding procedures outlined in this chapter.

813.6 Sports Club Federation shall adopt its own Standard Operating Procedure which shall not conflict with the Student Government Constitution or the Statutes. The Standard Operating Procedures must have the approval of the Senate General Assembly prior to any operations by the Sports Club Federation.

813.6.1 Sports Club Federation shall include its funding procedure with the Standard Operating Procedure.

813.6.2 These Standard Operating Procedures shall be approved every Fall and Spring semester by the Senate General Assembly if there are any changes requested by the Sports Club Federation.

813.6.3 The Standard Operating Procedures of the Sports Club Federation may be reviewed for denial at any time by the Senate General Assembly with supermajority consent.

To learn more, visit USF Travel: https://www.usf.edu/business-finance/controller/payment-services/travel.aspx

Fundraising

Any student organization is eligible to fundraise. Before you start fundraising, please complete the "Intent to Fundraise" form in the LSO portal in PeteSync. LSO will review that form and email the submitter approving or denying the request.

Donations

Fundraising by soliciting donations, whether cash or merchandise, is a powerful way to raise large amounts of money for important programs or events. Different ways to solicit donations are (a) person-to-person requests, (b) phone calls, and (c) mail solicitation.

All of these provide great opportunities to educate others about the importance of your program and gain financial support. Remember that providing detailed information is important. Be prepared to answer all kinds of questions about your program, including how the money will be used and who else is participating. Many businesses wishing to make donations ask for a tax-exempt number. Most student organizations are not tax exempt unless your organization has specifically applied for tax exemption from the IRS. Student Organizations cannot use the USF tax exemption number for the purposes of obtaining donations.

Raffles & Pools

A "raffle" means a game in which the prize is won by random drawing of the name or number of a person who has purchased chances. Raffles are limited to two (2) per non-profit organization per year. Section 849.0935 Florida Statutes dictates that only organizations exempt from Federal income taxation (tax exempt 501(c)(3) organizations) pursuant to Federal law may conduct raffles. In order to conduct a raffle, it must be done under the auspices of a 501(c)(3) corporation. If you are not a 501(c)(3) organization, you may not conduct a raffle under Florida law. The maximum cash prize that may be offered or paid for any one raffle is $1,000 and if merchandise is used as a prize the value of the item cannot exceed $25,000. **A tax exempt number is required.**

Raffles shall not be conducted in conjunction with BINGO games.

Net proceeds of a raffle means the receipts less the cost of prizes awarded (the amount left over after the prize is awarded). No less than ninety percent (90%) of the net proceeds of a raffle shall be used by the non-profit organization or association for charitable, religious, educational, civic, or other non-profit purposes. Therefore, if the raffle brings in $1,000, and we give away $500 as the prize, then the 90% rule applies to the remaining $500. None of the net proceeds of the raffle may be used to pay any person to conduct the raffle, or to rent a building where the tickets are received or sold or the drawing is conducted.

A half-and-half raffle is allowed, but remember that the raffle prize winner's earnings are subject to federal income tax. Additionally, the organization will have to report to the IRS any prize or award with a value of $600 or more.

Under Florida law, a ticket or a chance for a raffle may not be conditioned upon the receipt of a contribution, donation, or other type of monetary remuneration. Additionally, any ticket of chance or any advertisement for a raffle must indicate in clear language that no contribution or donation is necessary in order to receive a ticket.

Co-Sponsorship

Co-sponsorship of programs is a good funding alternative because it combines resources of existing groups and/or departments, and it generally benefits all co-sponsoring organizations, as well as the general student population. The most successful co-sponsorship arrangements consist of the following components:
• A proposal early in the planning stages that combines the resources of two or more groups in order to carry out a successful program or service.

• Involvement by all co-sponsoring organizations in the planning, marketing, and execution of the event. Requests for monetary contributions for co-sponsorships do not always create a sense of ownership on the part of the organizations and may discourage groups from assisting financially or otherwise in the future.

• A written agreement outlining which organization will carry out specific parts of a program or service. Written agreements should list time and date of program, the agreed-upon responsibilities of all co-

sponsoring parties, and the signatures of all co-sponsoring parties. This agreement should provide all the necessary details in order for all groups to contribute to the success of the program or service.

• All co-sponsoring organizations or departments should be recognized in advertising and promotional campaigns before, during, and after the event.

Organizations' Bank Accounts and Tax Identification Numbers

It is often beneficial for student organizations to have an off-campus checking account to deposit dues and any revenue generated from fundraising that did not involve student activity fees. By having an off-campus checking account, student organization leaders can more readily make payments and purchase items. It is beneficial for the group to have at least two signatures on each check to ensure that fraudulent spending does not occur.

If your organization is looking to establish an off-campus checking account, you will need to receive a tax identification number from the Internal Revenue Service (IRS). You can contact the IRS at the following number, (800) 829-4933 or visit their website, www.irs.gov, and look for form SS-4. Please make sure that you are requesting a tax identification number and not a tax exempt number. There is a fee associated with a tax exempt number; whereas a tax identification number is free. In order to establish an off-campus checking account or receive donations, businesses/banks require you to have a tax identification number.

Please note, the Office of Leadership and Student Organizations does not maintain information about off-campus checking accounts. All details and account information must be maintained within the student organization. It is highly recommended that student organization advisors are kept aware of off campus check accounts and financial information, but the all off campus checking accounts should be student run and advisors should not be listed as account holders.

The USF Federal Credit Union frequently serves student organizations by providing checking accounts. The Office of Leadership and Student Organizations will provide a letter for organizations to verify registration to establish an account at area banks and credit unions.

When a student organization ceases to exist for a time period of one year or more, and a bank account is not closed by the organization, the Office of Leadership and Student Organizations reserves the right to close the account and transfer any money remaining in the account to either another registered student organization with a similar mission and/or purpose or to an auxiliary account dedicated to supporting student organization development.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Federal Credit Union Policies and Practices

Should an organization want to open a bank account at the USF Credit Union, you will need to follow the steps below.

Open the Account

Organization must:

    a. Obtain a letter on USF Letterhead from the Office of Leadership and Student Organizations stating that the organization is affiliated with USF.

        i. This letter must list all officers needed to be places on the USF Federal Credit Union organization account as authorized signers.

2. Provide USF FCU with a copy of the organizations meeting minutes, identifying the persons authorized to be signers on the account. The signers on the account must be current students enrolled at USFSP.

    a. This letter must match the names printed on the letter from LSO and must state in plain language the names of those who are designated as signers on the account along with the individual's position.

3. Provide the letter from the IRS stating the Tax Identification Number (TIN) or Employee Identification Number (EIN)

    a. Organization can apply for a TIN/EIN through the following:

        i. Apply online at https://www.irs.gov/pub/irs-pdf/fss4.pdf

        ii. If the organization is using the EIN of the national chapter of its organization, a letter from the National Chapter must be provided at the time of opening to show that this is permitted by the National Chapter.

4. All signers are subject to the cred union's opening account screening procedures.

Changing Authorized Signers

1. If an organization wants to remove or add signers to the account, it must provide USF FCU with a copy of the meeting minutes specifically stating the changes to be made to the USF FCU account, not just the changes to the organization's officers.

    a. The copy must contain the new names, titles of the signers to be added as well as removed, and the authorized persons to sign on the account.

2. USF FCU will also need a letter from LSO that corresponds with the meeting minutes stating the names of the individuals that are being added to the account and the new signers' ID.

    a. The online banking password will be reset.

3. ALL INDIVIDUALS THAT ARE BEING ADDED TO THE ACCOUNT AS AUTHORIZED SIGNERS MUST BE PRSENT WITH A GOVERNMENT ISSUED ID AND USF STUDENT ID.

Closing the Account

1. Any signer can close the account
2. Signers may close the account via fax, mail, or in person

    a. CLOSING PROCEEDS WILL BE DISBURSED BY OFFICIAL CHECK MADE PAYABLE TO THE ORGANIZATION

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Reservations and Campus Policies

Description of Reservation Services

Student Centers & Events is located in the Administrative Office of the University Student Center (USC 173) and is responsible for the coordination of activities and events within the University Student Center and other campus locations.

The services offered by the office include, but are not limited to:

• Venue reservation

• Event review

• Furnishing and arrangement of room setups

• Coordinating event staff, security, and University Police

• Coordinating audio visual services

• Assisting with catering and food services needs and release forms

To reserve spaces managed by Campus Recreation (including, but not limited to The Edge, Fitness Center, Athletic Courts/Fields), visit https://www.usfsp.edu/campus-recreation/facilities-and-reservations/.

Reservation Timeline:

Reservation Requests must be received at a minimum:

- Five (5) business days for any regular meeting requiring no review or special requirements – Including Information table requests
- Ten (10) business days for all other events
- Extended time frames may be required for large or complex events

Reservation Fees:

Student Organizations who are officially registered are not assessed rental fees for Student Centers & Events venues if the:

- Event is conceptualized, planned, and managed by the student organization for students
- Event supports the mission and objectives of the organization
- Members of the student organization must be the original requesters, the primary organizers, and coordinators of the event
- Student organizations will be assessed for rented equipment and event support costs. University Police and/or Student Centers & Events security may be required in accordance with University or EMS policies and reflect an additional cost. Event support costs/ needs will be determined by Student Centers & Events Associate Director or designee.
- Cancellations will be accepted by Reservation Services up to seventy-two (72) hours before an event. Events held in the University Student Center Ballroom, must be cancelled at least two (2) weeks prior to the scheduled event date in order to avoid cancellation fee.
- All patrons that do not cancel prior to seventy-two (72) hours will be assessed a late cancellation fee for rental space and support services.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

- Patrons with multiple late cancellations may lose reservation privileges for all Student Centers & Events event space.

Early Open, Late Close, or Overtime Charges

Facilities are available for the specified Student Centers & Events building hours. Organizations are asked to request any needed setup or take down time as part of their reservation. A request from an organization to enter a facility before the beginning of the reservation time, or remain in the facility after the reservation time, may be denied or incur early/late charges.

Audio/Visual Equipment Usage and Staffing Procedures

The Student Centers & Events Office provides audio/visual equipment and personnel services. Reservation Services has a variety of audio/visual equipment available for use within the University Student Center and outdoor areas.
- Requests for equipment must be made at least seven (7) business days prior to the event.
- An organization may cancel an equipment order or staffing request up to two (2) business days prior to an event without penalty.
- Equipment orders or staffing requests cancelled with less than two (2) business days' notice will be charged to the organization's account at the regular rate, even if the equipment is not used.
- Technicians will also be required in other venues when multiple types of technologies are requested, such as microphones, sound systems, lighting, etc. There will be a per hour charge for technicians in these situations.

Decorating

Fire Regulations: All decorative materials must be flame proof and/or fire retardant.
- No decorations may be hung from the ceiling, placed in offices, rooms or lounges in a manner that will interfere with safe passage or evacuation.
- No decorations shall be placed in hallways, aisles, stairwells, or exit routes.
- All exits must be free of barricades.
- Exit signs, fire extinguishers, smoke detectors, fire pull alarms, emergency lights, and audible fire signals/strobe lights cannot be decorated, covered, or obstructed in any way.
- Any extensive electrical power usage must be approved by EMS.
- Caution must be taken to keep all paper or cloth free from light fixtures.
- The use of candles, incense, lanterns, oil lamps, and other devices with open flame is forbidden.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

- No nails, screws, hooks, etc., may be driven into any walls, floors, or ceilings. Tape may not be used on floors unless it is designated as "floor tape". Floor Tape will be provided upon request. Regular masking, box, or duct tape is not permitted on any walls, floors, or ceilings.
- Tables do not come with tablecloths. This is an extra fee and must be reserved with your event planner.
- Any freestanding decorations must be stable in nature and lightweight in construction.
- Balloons are allowed, but must be weighted or tied to centerpieces/chairs. Any balloons that become loose will incur fees.
- No decorations may be glued to any surface. No pins or tape may be used to adhere posters, paper, etc., to the walls, ceiling, drapes, floor, tables, etc.
- Dry ice is not allowed in the University Student Center without prior approval by EMS and must be handled by a licensed caterer.
- Electric lights can be used as long as they are used in compliance with the manufacturer's recommendations.
- No glitter or confetti (plastic or paper) may be used.
- Smoke machines (or similar devices emitting visible gas vapors) may not be used.
- No fresh cut trees are ever permitted in the University Student Center and other facilities on campus.
- Painting is prohibited within the reservable spaces inside the University Student Center.

Decorating plans not addressed within this policy must be review with EMS staff prior to the event. Decorations must be removed immediately after the event. Failure to do so with incur a clean-up fee

Violation of any of these policies may result in suspension of facility reservation privileges. Additionally, any damages done will be repaired by the Student Centers & Events Office and the client will be billed for all costs incurred on the basis of materials required and staff time.

Noise/Amplified Sound

- Limited Amplification is allowed in University Student Center Indoor & Outdoor Areas with prior approval and will be monitored by Student Centers & Events staff.
- The volume must not be at a level greater than is necessary to reach the audience in the immediate area; it must not be of such a volume as to reasonable interfere with those who are pursuing academic, professional, personal or other recreational activities.
- Non-amplified music such as piano or a cappella singing in meetings rooms should be kept to a low volume so as not to disturb meetings in adjacent rooms. If the Student Centers & Events staff receives noise complaints, the group may be asked to stop the music at that time.

Late Requests

Requests that are made after the acceptance processing constraints (refer to Reservation Timeline) will be accepted up to the discretion of the Associate Director or designee. If an appropriate room is available, it may be assigned, but special services may not be available. Special services include changes in room arrangements, requests for audio-visual equipment, or additional staff.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Information Tables

Information tables in the University Student Center and specified outside areas are available to registered Student Organizations, Departments and Non-University organizations (for a fee, and with approval).

> • Requests for Information Tables are can be submitted online, http://ems.usfsp.edu/emswebapp within appropriate time frame (please refer to the Reservation Timeline)
>
> • All reservation requests will be in time queue to ensure each request is prioritized properly.
>
> • Prospective users of the Information table space forfeit their space if not in use within one hour of the starting time specified on the reservation request form. Repeated failures to cancel a tabling reservation twenty-four (24) hours prior to contracted time may result in loss of privilege or use.

Failure to comply with Information table policies and/or the reasonable requests of Student Centers & Events staff may result in cancellation of the current and/or future Information table reservations.

Procedures for Tabling

Tri-folds and displays may be setup on the Information table. Posting on walls, columns, and windows is not permitted.

- At least one member of the reserving organization/department must be present at the table for the duration of the reservation. Representatives must stay behind the Information table or within two feet in front of the kiosk.
- Distribution by means involving shouting, yelling, or physically approaching individuals is prohibited, as is any interference with normal functions or interruption of the free flow of traffic, inside or outside the University Student Center.
- Commercial literature may not be distributed in the University Student Center unless approval has been received from the Student Centers & Events administration.
- All literature distributed must clearly identify the organization or department. All individuals or organizations distributing literature will be held responsible for cleaning up litter resulting from its distribution.
- Credit card solicitation is not permitted.
- The use of any audio/visual equipment must be approved in advance by Event Services.
- Information tables must remain in designated area.
- Student Organizations may sell items, which are not in direct competition with items sold by the USF Bookstore, University Dining Services, or other service areas in the University Student Center or on campus. If the item(s) to be sold are considered to be in direct competition, the activity may be subject to additional review by Student Centers & Events administration.
- The sale or distribution of any material that is racially or sexually offensive to members of the University of South Florida St. Petersburg community is not permitted.

- The sale or distribution of food items, including baked goods, drinks, candy, etc., is subject to approval by Student Life and Engagement. Other approvals may also be required, depending on the nature of the items offered.

Storage

The Student Centers & Events office is not responsible for items left in the building, and storage space is not normally available for materials or equipment used in association with an event. Such items are the sole responsibility of the organization.

DVD/Video/Movie

Federal copyright law restricts the showing of videocassettes, DVDs, video games and internet to private showings. Public performance is prohibited without prior written consent of the holder of the copyright. A public performance includes, but is not limited to showing a motion picture (DVD, video, internet):
- in a location open to the public
- to a selected group of people gathered in a location not open to the public (i.e. residence hall floor or lounge)
- by broadcast or transmission

Student organizations choosing to publicly show a motion picture in any form (film, VHS video, DVD, internet, etc.) must secure a license from a booking agency.

Hosting Events that Include Alcohol

Alcohol Policy: http://regulationspolicies.usf.edu/policies-and-procedures/pdfs/policy-30-023.pdf
Requests must be made at least 30 days prior to event.

Hosting Events with Food

Student Organizations and University departments are allowed to bring outside food and beverage. Both the organization and departments must first complete a Food release form and have it approved by Associate Director or designee.

External Catering Services

- Should an external catering service be used, the caterer must be approved by completing the Catering application and submitting it and subsequent documentation to the Reservation

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Services office on an annual basis. Based on the information provided the Assistant Director or designee will either approve or deny the caterer.

- Should the caterer fail to meet the Student Centers & Events accepted policies and procedures they can be removed from the University facilities at any time. The University will not be held accountable for caterers' actions and subsequent cancellation of events for caterers failing to adhere to policies and procedures.
- Non-university affiliates my not utilizes an external catering services or bring in any outside food and beverage at any time.

Facility Charges

- Student organizations and university department events scheduled at the University Student Center who utilize external catering services will incur an additional 10% facility fee on all **catered** food and beverage to be paid by the catering vendor.

Right to Reassign

- Facilities are reserved in the order in which requests are received, with first consideration given to institutional needs and major annual events such as those related directly to the advancement of student life, academic success and University tradition (e.g., Homecoming, New Student Orientation or Welcome Week). Determination of which events are considered major annual events will be made by the Associate Director of the Student Centers & Events, in consultation with the Director of Student Life and Engagement, Regional Associate Vice Chancellor and Chancellor's office.
- After the space requirements for institutional needs and annual major University events have been met, requests for reservations are filled in the order in which they are received following a schedule of access based on user category (See Reservations procedures and timelines). The staff of the Student Centers & Events reserves the right to assign, and if necessary, reassign facilities considering the size of the group, type of program, and space available to assure the maximum and most appropriate utilization of space.

General Guidelines for Space Reservation

EVENT SPACE IN THE UNIVERSITY STUDENT CENTER IS AVAILABLE FOR USE BY REGISTERED STUDENT ORGANIZATIONS, UNIVERSITY DEPARTMENTS, AND NON-UNIVERSITY ENTITIES.

- Other campus locations may be available through coordination with other University offices (i.e. Campus Recreation, Physical Plant, etc.) Student Centers & Events does not schedule classroom space for student organization, departments, and non-university groups. If classroom space is needed in conjunction with Student Centers & Events managed spaces, the organization should make those arrangements separately.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

- Patrons that request space in the University Student Center or other outdoor areas will send an event confirmation via email. The reservation confirmation itemizes rental rates, Audio/Visual Support and other support requirements. Your event is not considered confirmed until you confirm receipt of the email.
- Reservation Services will reply within 7 business days with: confirmation, request for more information, or denial.

Space Stats: http://www.usfsp.edu/Student Centers & Events/stats/

Event Planning Guide: https://www.usfsp.edu/Student Centers & Events/files/2018/10/Event-Planning-guide-USFSP.pdf

Logos and Trademarks

Organizational units of the USF System, registered student organizations and official USF System faculty and staff groups may use USF System name and symbols for official USF System business purposes within the USF System or for non-commercial purposes at USF System sponsored events. Learn more http://regulationspolicies.usf.edu/policies-and-procedures/pdfs/policy-0-215.pdf

Student Organization Compliance with the Code of Student Conduct

All organizations are required to abide by the USF Code of Student Conduct. If there is a report that an organization is not abiding by the USF Code of Student Conduct, then the organization will be reported to USFSP's Code of Conduct office where an investigation will take place. To view the entire Code of Student Conduct, visit http://regulationspolicies.usf.edu/regulations/pdfs/regulation-usf6.0021.pdf.

Disability Services and Accessibility

USFSP Student Disability Services works to ensure that students with disabilities have access to education and campus life at USFSP. To ensure full participation and access to the benefits of participating, student organizations need to be accessible to all members, participants, and guests.

University Hazing Policy

The University of South Florida St. Petersburg prohibits any form of hazing of its students at any time or at any location. The University will respond swiftly to investigate reports of alleged hazing received from any source, and will promptly determine whether to proceed with campus disciplinary action, to forward a report to appropriate law enforcement officials for prosecution as a criminal matter, or both. To that end, hazing is a violation of the Student Code of Conduct and illegal as defined in the Florida State Statute 1006.63.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

A faculty member, staff member, or student who observes hazing of any person or persons who may be USFSP students should immediately report the matter to the Department of Student Life & Engagement, Student Life Center 1301, (727)873-4180, or to the Campus Police (727)873-4444. Students who know, or suspect, that hazing has taken place are strongly encouraged to report it to the Director of Student Life & Engagement. Employees of USFSP are required to report such information.

"Hazing" as defined by §1006.63, Florida Statutes, means any action or situation that recklessly or intentionally endangers the mental or physical health or safety of a student for purposes including, but not limited to, initiation or admission into or affiliation with any organization operating under the sanction of a postsecondary institution, regardless of a person's willingness to participate. "Hazing" includes, but is not limited to, pressuring or coercing the student into violating state or federal law; any brutality of a physical nature, such as whipping, beating, branding, exposure to the elements, forced consumption of any food, liquor, drug, or other substance; or other forced physical activity that could adversely affect the physical health or safety of the student; and also includes any activity that would subject the student to extreme mental stress, such as sleep deprivation, forced exclusion from social contact, forced conduct that could result in extreme embarrassment, or other forced activity that could adversely affect the mental health or dignity of the student. Hazing does not include customary athletic events or other similar contests or competitions or any activity or conduct that furthers a legal and legitimate objective.

In addition to Florida Statutes §1006.63, hazing as defined by the USF system also includes, but is not limited to, the forced use of alcohol; morally degrading or humiliating games and activities; physical and psychological shocks; deception; verbal abuse; personal servitude; kidnapping; deprivation of privileges granted to others in the organization by use of force or duress; and any other activities which are contrary to academic achievement, the stated purpose of the local and/or (inter)national organization, and/or the mission, policies or regulations of the USF system or applicable state law.

View the full policy here: http://regulationspolicies.usf.edu/regulations/pdfs/regulation-usf6.0023.pdf

SOCAT Health and Wellness Interventions

The Students of Concern Assistance Team (SOCAT) serves as an administrative, interdisciplinary team which assesses referrals, develops action plans and monitors red flag behaviors across the campus community.

Student Outreach and Support (SOS) is the case management office for SOCAT. SOS staff provide outreach to and conduct needs assessments with the students referred to SOS and SOCAT.

View full policy here: http://regulationspolicies.usf.edu/regulations/pdfs/regulation-usf6.0163.pdf

Student Leader GPA Expectations

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

It is an expectation that all student organization officers (President, VP, Treasurer, Secretary) have at least a 2.0 cumulative USFSP GPA. Student organization officers with less than a 2.5 cumulative USFSP GPA may be referred to the Student Success Advocates in Compass.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Publicity and Communication

Student Organization Newsletter

The Office of Leadership and Student Organizations sends out a bi-weekly newsletter via PeteSync to all student organization officers and advisors. If your student organization would like to advertise an upcoming event, send the information to LSO@usfsp.edu.

Posters and Flyers in the Student Centers (USC/SLC)

Physically produced flyers can be hung on the flyer boards located in The Reef in the University Student Center and in the Atrium of Student Life Center. You must submit a physical copy of your flyer to the corresponding Information Desk for approval. If your flyer does not meet the guidelines listed below, then it will not be approved. If your flyer is found posted without approval, then it will be removed. Two or more repeated instances will result in appropriate actions taken with your student organization/department.

- Visit the Information desk in the corresponding facility to have the flyer approved.
- The following information should be included on all postings:
    - Name of Event
    - Date of Event
    - Location
    - Sponsoring Organization
- Postings will be displayed for a maximum time of two (2) weeks.
- Postings will be removed after event.
- Postings are only permitted on the magnet board on the first floor of the University Student Center and on the magnet boards in the SLC Atrium.

Posters and Flyers in the Residence Halls (RHO and USC)

Posting flyers in the Residence Halls is a great way to advertise student clubs/organization meetings, programs and events, and events happening with campus departments. If you have an event you would like to advertise for, please see the following steps for getting your flyers posted in the residence halls.

1. All flyers are to be approved through the Housing & Residence Life office before posting.
2. If you need a flyer approved for posting, please come in person to the Housing & Residence Life office at RHO 100 to get approval.
3. Please bring **TWO** copies of your flyer. There is one flyer board per building (one in RHO and one in USC).
4. Flyer dimensions should be 8 1/2 X 11. Flyers larger than these dimensions will not be approved.
5. Only University student organization and departmental advertisements/flyers are allowed in the residence halls.
6. Flyers that have not been through the flyer approval process will be taken down by Housing & Residence Life staff.

If you have any questions about the flyer submission process, marketing and advertising in the halls, contact the Residence Life Coordinator.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Chalking

- Chalking should be on the sidewalk only and cannot be on any covered sidewalks (i.e. any part of the sidewalk that is covered by an awning, hanging, etc.).
- Chalk can be borrowed from The Source (SLC 1800). If none is available, groups must provide their own chalk.
- Chalking can be done one (1) week before the event.

USC/SLC Window Marking

- Window marking is allowed on USC and SLC windows and must be requested through EMS.
- Windows can be reserved 14 days prior to or up to event date, whichever comes first.
- Window painting is reserved to promote major, campus-wide events at the discretion of the Student Centers & Events Staff.
- Only 4 windows can be reserved at a time.
- Paint can be borrowed from The Source (SLC 1800). If none is available, groups must provide their own paint. Paint must be water based poster paint and must be removed immediately following the event, typically within twenty-four (24) hours.
- If a cleaning company is contracted to remove the paint from the window, your organization or department will be responsible to pay for the costs which typically range from $100-$400.

Others

Promo tables, yard signs, and buttons are additional elective methods to market your organization or event. You can reserve a promotional table inside the USC by visiting the Reservations Desk or through the EMS platform.

Digital Signage/Bullseye

The Bullseye digital screen is available for digital flyers, advertising upcoming and current events on campus. Registered student organizations and University departments are eligible to submit digital flyers.

- Digital information must pertain to a campus event or service at the university.
- Digital information may not be commercial or political in content.
- Non-USF activities will not be approved for display.
- Digital Flyers will be displayed for a maximum time of two (2) weeks. If you would like your digital flyer to be displayed for a different time period, please contact the Student Centers and Event at reservations@usfsp.edu.
- Designs should be in 16:9 format with a minimum resolution of 720 pixels by 405 pixels at a resolution of 72 dpi and submitted as a .png, .jpeg, or .pptx file. Art that is not formatted correctly may not be approved.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

- All art submitted is subject to approval by the Student Centers and Event staff.
- Submit your digital flyer at www.usfsp.edu/usc/marketing-in-the-usc/

Review all policies and download a pre-formatted PowerPoint template at
http://www.usfsp.edu/Student Centers & Events/marketing-in-the-Student Centers & Events/

Pete Points

Pete Points are a great way to incentive students to attend your events. To request Pete Points, visit the Pete Cube Portal in PeteSync and fill out the Pete Points Approval Form. Once you receive the confirmation that your event has been granted Pete Points, you can use the Pete Points icon on all flyers.

Email Communication

Student Organizations can share events to the homepage of PeteSync and through a News Post. To learn more, email LSO@usfsp.edu.

Tips for Successful Advertising

Most successful advertisements cover the basics:
- Event Name
- Location
- Date
- Time
- Sponsoring Organization (s)
- Contact email, website, or social media account
- An eye catching graphic

Be sure to develop a timeline to market and advertise so that people have enough time to plan ahead to attend your event, and are reminded again right before your event happens.

Policies are written as of June 2019. For most up to date policies, visit http://www.usfsp.edu/usc/

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Student Leader Workbook

Currently registered student organizations are required to complete an annual registration process with The Office of Leadership and Student Organizations. This process must be completed annually by **5 pm on the first Friday of September.** Those groups who do not complete the process by the deadline will lose its registered status, which includes all student activity funds allocated to the organization and all benefits granted by the registration process.

Here is a checklist of Annual Registration requirements to assist you in completing the process by the deadline.

- ✓ Update Organization Profile in PeteSync
  - o Review your organization's profile in PeteSync and update any officer, member, and/or advisor information as well as update your Constitution if needed. Pay close attention to any emails coming from LSO staff members regarding your profile's status.

Date Submitted: _____   Submitted by whom: _____

Monthly Planner

Here is a checklist of important dates, activities, and things to remember as you serve in your role throughout the next year. Please refer often to this list and feel free to add items of your own in the spaces provided.

August
- ☐ Hold a meeting of officers and advisor(s) to discuss and evaluate goals for the year
- ☐ Recruit new members at Get on Board Day which occurs during Week of Welcome
- ☐ Submit your Affiliate Advisor application (if applicable)
- ☐ Agree on a regular meeting time and reserve space in EMS
- ☐ Inform your advisor(s) of meeting times
- ☐
- ☐

September
- ☐ Plan an interesting and effective first meeting
- ☐ Set goals for the semester/year
- ☐ Apply for SG funding and plan for upcoming events
- ☐ Schedule a team building session for your executive board
- ☐ Plan a fundraiser event

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

☐ Complete the registration form in PeteSync by the first Friday in September
Remember
- Officers are learning their new roles
- Plan an activity to acquaint your members to assist with team development
- Educate your members on the organization's purpose

October
☐ Organize a group community service project for your organization
☐ Continue to keep your advisor informed
☐ Be on the lookout for and reach out to prospective members at events
☐ Sign up to participate as an organization in Homecoming activities (ex: Cardboard Boat Race)
Remember
- Keep your members engaged in conversation and activity
- Conflict may begin to arise amongst members
- Members may be stressed about midterms
- Organization may start losing members due to time commitments

November and December
☐ Register for Spring Get On Board Day
☐ Register to participate in the MLK Day Parade
☐ Plan end-of-semester activity
☐ Elect new officers and plan an officer transition retreat (if applicable)
☐ Update PeteSync portal
☐ Begin planning for spring semester
☐
☐

Remember
- Members are ready for Thanksgiving/Winter breaks
- Members may be stressed and busy with academics

January
☐ Attend MLK Day Parade and Spring Get on Board Day
☐ Set new goals and evaluate old goals
☐ Recruit new members
☐ Apply for SG funding and plan for upcoming events
Remember
- Academic commitments may cause loss of members
- Welcome and orient new members
- Members might be slow to get motivation on activities again

February and March
☐ Review and update constitution/bylaws

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

- ☐ Continue to work on spring semester goals/activities
- ☐ Submit nominations for The Rocky's
- ☐
- ☐

  Remember
  - Seniors may be pre-occupied with graduation, finding a job, next steps, etc…
  - Members might start stressing about midterms
  - February is already a short month and Spring Break occurs in March so the two months' fly by

April and May
- ☐ Complete Annual Registration for next year
  - o Update PeteSync Portal
- ☐ If you want to store organization's supplies on campus over the summer, submit an application for a storage bin
- ☐ Attend The Rocky's
- ☐ Elect new officers and plan officer transition retreat (if applicable)
- ☐ Closer current budget and develop new budget for next year
- ☐ Review successes, accomplishments, and areas for growth
- ☐ Plan an end of year activity
- ☐ Recognize valuable organization members
- ☐ Establish summer contact list
- ☐
- ☐

  Remember
  - Academic pressure is mounting on members
  - Recognize your advisor's commitment to the organization

Summer
- ☐ Stay in contact with organization members
  - o Complete Annual Registration for next year (if you didn't get it done by end of May)
  - o Update PeteSync Portal
- ☐ Make marketing/recruitment plans for the fall
- ☐ Register for Get on Board Day
  - *Remember*
    - Members might have internship or work commitments that will limit availability and activity level
    - Find a way to relax and reflect on your own journey

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

QUESTIONS TO CONSIDER

There are many items to consider with assuming the role of President of any student organization. It is with this thought in mind thirty questions have been prepared. It is sincerely hoped that this self-study sheet will help you in assuming your responsibilities as President. You may want to ask yourself each of these questions:

1. Do I know the purpose of the organization?

2. Do I know where to find the constitution?

3. Have I read the organization's constitution?

4. Have I thought of my responsibilities as an officer of a student organization?

5. Have I discussed my role as an officer with my advisor(s)?

6. Have I discussed my role as an officer with other organizations' presidents or with the other officers of my organization?

7. Have I discussed with the officers, individually or collectively, chief objectives and goals for the organization?

8. Do I engage the officers' and members' interest in the organization?

9. Is the group participation distributed broadly or limited to only a few volunteers?

10. Do I have informal or social contact with the students of the organization or my advisor?

11. Do I involve non-students, alumni, or faculty/staff in my organization? If so, to what capacity?

12. Do I try to involve my advisor in the organization's activities as much as possible?

13. Are my organization's projects and activities evaluated annually for their value to the organization and others?

14. Are meetings and activities announced effectively so that everyone can plan to be present?

15. Do I meet with my advisor on a regular basis?

16. How much do I involve myself with other organizations in joint projects or collaborations?

17. Have I discussed with LSO the facilities and assistance available to the student organizations on my campus?

18. Does my organization make use of the assistance and facilities available?

19. Am I familiar with the Student Government Association constitution and the sections pertaining to student organizations?

20. What position-specific things do I want to know about (i.e., website, reports, timelines, duties, etc.)

21. What am I looking forward to most about my position?

22. What do I consider to be the greatest responsibility of my office?

23. What skills will I need to be a successful leader and officer in this role and how will I develop those skills?

24. What are my expectations of myself in this position?

25. What expectations do I have for the rest of the student group leaders?

26. What expectations do I believe others have of me?

27. What resources and services do I need to know more about?

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

28. What people should I get to know to be successful in this position?

29. What are my immediate priorities and what action items/goals can wait until late in my term?

30. What other questions do I want answered as I begin in the role?

HELPFUL HINTS FOR PRESIDENTS

Go easy on the vitamin "I".
Your opinion does count, but it counts equally as much as anyone else's opinion in your group. If you express an opinion that is not in sync with the group, encourage everyone to give their thoughts on the subject.

Have someone keep minutes of every meeting.
Have someone take minutes of every meeting and get copies to all the committee members and advisor(s) (or post in a regular location). Keep the original in your files.

Have someone keep accurate event reports.
Here again you cannot rely on memory about an event six months after. Keep reports of all events, information collected, and who sponsored or helped. This is also a good way to document the good things your group is accomplishing.

Keep your financial reports accurate and up-to-date.
You cannot do a good job unless you know how much money has been spent and how much you have left in your budget. You should keep a record of all expenditures. When in doubt, don't be afraid to visit Student Involvement and ask for help.

Benchmark and collaborate.
A lot of material from various sources will be routed to each organization officer. Keep anything of interest to your organization to build a large database of information available to your group. During the quiet months (break and summer), collecting ideas from other schools may help. Informed groups are productive groups.

Evaluate your work at regular intervals.
You learn from mistakes. You and your organization members should honestly evaluate every activity you plan and carry out. Also, about twice a year go back to your basic mission statement and see if you are still on track.

Show your appreciation.
In order to build more satisfying relationships with the members of your organization, make a conscious effort to express more gratitude, appreciation, delight, affirmation, and encouragement. Appreciation rewards your members and lets them know that their many contributions are noticed. No matter how

routine an action might be, saying "thanks" helps members feel their contribution was worth the effort. It takes an active awareness to continue giving appreciation.

ICEBREAKERS & TEAM-BUILDERS

Question Ball
Take a ball and write different numbers on it. Have participants stand in a circle and throw ball around to different participants. Have participants answer questions based on the number where their thumb lands. Make sure to have questions predetermined.

M&Ms
Pass around a bag of M&Ms. For each M&M in their hand, the participant must say something about himself or herself. Have the participants count the number of M&Ms they have and then let them go ahead and eat them otherwise they might melt in the hand and not in the mouth. Another twist on this game is have each M&M color assigned to a pre-determined question and each person answers questions based on the colors and number of M&Ms they have.

Grab Bag Questions
Fill a bag with different questions and then have each member of the group draw a question and then answer it and share the answer with the group.

Sample questions include: I get frustrated when...; I need support when...; What motivates me is...; My pet peeve is...; I'm afraid of...; My favorite daydream is...; What is something you need from this group? When someone doesn't listen to me I...; What do you want to be when you grow up? Who is your hero and why? What is your favorite spare time activity? What TV commercial do you like the most? What was the nicest gift you ever got? What is your favorite sound? What is your favorite music? What is your talent? What is your nickname? My favorite movie is...; My favorite food is...; My favorite color is...; What I do in my spare time is...; What I do to blow off steam is...; The most fun I ever had was...; The most difficult thing I ever had to do was...; The fictional character that best matches my personality is...;

Coat of Arms
This activity is a great opportunity for members of a particular organization to get to know each other at the beginning of the semester and to develop a sense of group identity. Materials needed are: a piece of white paper for each participant and markers or crayons for each participant. Draw a shield or Coat of Arms and divide that into 6 sections. In each section, draw pictures that illustrate these 6 topics: talents; hobbies; where you are from; family; goals; and personal motto. When participants have finished with their pictures, have each person show the others their drawing and explain why they chose to draw what they did.

Connections
One person starts out by introducing themselves to the group with their name and an interesting fact about themselves. When someone in the group hears something they have in common with the

speaker, they say "Connection" and link arms with the first speaker. Then the next person introduces them self and a new interesting fact. The pattern continues, and the last person has to find something they have in common with the first person. Eventually everyone's arms will be locked in one big chain.

Keep it in the Air
The goal of this activity is to keep the ball in the air for a designated number of hits and a designated number of hits per individual. If the ball hits the ground, the group must start over. If an individual hits the ball twice in a row, the group must start over. As an example, for a group of 10, the total goal might be 100 hits and each individual must hit the ball 8 times.

Engaging All Members

It is crucial for you to ensure that all members are engaged throughout the year. Here are some ideas to help keep all of your members involved and engaged in organization activities.

Recruitment
- Ask individuals to join if you know that they are interested
- Use inclusive language on your membership materials (avoid community based language/slang and use standard language)
- Make sure that you genuinely want to engage members and be able to articulate how and why

Retention
- Co-program with other types of groups
- Determine how program topics impact your members
- Make sure that your programs meet the needs of all of your members
- Ask members if things need to be changed to make you be a more inclusive group
- Are your meetings at accessible times and in accessible places for all
- Understand differences in priorities
- Make sure that the environment includes where all members feel heard

Activation
- Change things to meet the needs of your members
- Grow leadership skills of those interested
- Discourage cliques from forming
- Give the members something to do, even if informally

Brainstorm some ideas of how you might work to engage all of your membership:
_____
_____
_____
_____

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Creating a Communications Plan

The following will assist you and your organization in developing a communications plan.

I.   **Goal** (overarching goal for this communications plan)
 Example: Our communications efforts will build support from the general student body, organization leaders and campus leaders around our needs.

II.   **Objectives** (3-4 objectives that demonstrate how you plan to achieve your overarching goal)
Example: Build demand for our service by educating students about the usefulness of our organization to their daily lives.
• List 3-4 of your organization's objectives:
- ▪
- ▪
- ▪

III.   **Target Audiences** (primary audiences to engage with your communications efforts)
Example: Students, community leaders, general public, policymakers • Who are your organization's target audiences?

IV.   **Key Messages** (3-4 key messages related to your goal)
Example: We are working in partnership with community agencies, schools, business and local governments to promote policy and environmental change.

V.   List 3-4 key messages that you need to communicate to your audience:
a.
b.
c.
d.

VI.   **Spokespeople and Partners** (individuals, groups and organizations to help implement your plan)
Example: College administrators, student government, representative from a local community group

• Who are some spokespeople you'd like to identify and recruit for your cause?

VII.   **Tactics** (programs, strategies, and media efforts to help achieve your objectives and ultimately your goal)

Example: Create products to promote the identified key messages, organize meetings with community leaders to share the goals and objectives, utilize social media to build advocates • What tactics will your organization focus on?

VII. **Timeline** (when you will implement and complete each tactic in your plan)

Developing Smart Goals

S.M.A.R.T. goals are a way to lay out your goal setting and recognize how to achieve your goals. S.M.A.R.T. Goals are not only smart, but they are **S**pecific, **M**easureable, **A**ttainable, **R**elevant and **T**imely.

Specific
- What: What do I want to accomplish?
- Why: Specific reasons, purpose or benefits of accomplishing this goal
- Who: Who is involved?
- Where: Identify a location
- Which: Identify requirements and constraints

Measureable
- How much?
- How many?
- How will I know when it is accomplished?

Attainable
 - How: How can the goal be accomplished?
- Is it actually within reach?

Relevant
- Does this seem worthwhile?
- Is this the right time?
- Does this match our other efforts/needs?
- Are you the right person?

Timely
- When?
- What can I do 6 months from now?
- What can I do 6 weeks from now?
- What can I do today?

Example Goal: To recruit lots of new members.

S.M.A.R.T. Goal: By the end of the fall semester we will have recruited 22 new members in order to help create a larger presence on campus and assist with our upcoming planned activities. Using the guide above, write an example of an organizational goal and then turn your goal into a S.M.A.R.T. goal.

Example Goal:

_____
_____
_____

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

SWOT ANALYSIS FOR BEGINNERS

No organization will survive long without adjusting to the patterns of change found in the larger world outside. Some changes help and some hinder. When developing a long-range plan, corporate managers and public managers have often sought to understand an organization's potential within its changing environment by engaging an analysis of strengths, weaknesses, opportunities, and threats-- often abbreviated as a SWOT analysis-- because such an approach can be informative and provide perspective. As you begin to establish a plan for your organization over the course of the next year, consider using the chart below to help you identify what strengths, weaknesses, opportunities, and threats may impact your organization.

STRENGTHS: Aspects done right either individually or as an organization. This section contains both strengths within the organization and external strengths, such as community relationships.	**WEAKNESSES:** Aspects of your organization that detract from the value you offer or place you at a disadvantage. You need to enhance these areas in order to thrive on campus.
OPPORTUNITIES: Factors that represent reasons your organization is likely to prosper such as dynamic recruitment or having created a niche membership on campus.	**THREATS:** External factors beyond your control that could place your organization at risk. You have no control over these, but you may benefit from having contingency plans to address them should they occur.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

ADVISOR CONVERSATION STARTER

The success and effectiveness of your organization can be improved a great deal through a good relationship between advisor and student leader. In the advisor/student leader pairing, a general understanding and a concerted effort to develop the relationship is essential. Too often we take relationships for granted and think things will automatically fall in place. As in all relationships, it is important to learn about one another's expectations, goals, wants, needs, strengths and weaknesses. To help you do just that, we have provided you with the following list of questions. We encourage you to sit down together and discuss your answers to the questions provided.

1. What motivated you to assume your position (advisor or leader)?

2. What are you most excited about as we begin this year?

3. What are you most anxious about as we begin this year?

4. What personal and/or professional goals have you made for this year?

5. When you think about your skills and abilities, what would you list as your strong points?

6. When you think about your skills and abilities, in what areas would you like to improve?

7. What are you hoping to learn from this experience?

8. Which of your personal qualities do you admire most?

9. What kind of advisor/student relationship would you like to see?

10. What kind of relationship would you like to have with the other officers?

11. How would you describe your advising/leadership style?

12. What techniques do you use to motivate yourself and others?

13. When you are upset or disappointed about someone's behavior or performance, how do you respond?

14. When people meet or exceed your expectations, how do you respond?

15. What are some of the things you think we should do in training officers and members?

16. When considering your position, in what areas do you feel confident or comfortable? In what ways are you least comfortable?

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

MIDTERM ADVISOR EVALUATION

Just as you take your midterm exams for class, it is important to do a midterm evaluation with you and your advisor. Provided here are some points of consideration during this evaluation time. Take 10-15 minutes to score (1 being not satisfied and 5 being highly satisfied) and share your thoughts on the statements listed below. Your feedback is valuable to the advisor/student leader relationship.

1. I am satisfied with the amount of time our advisor spends with our group.

2. I am satisfied with the quality of time our advisor spends with our group.

3. I am satisfied with the amount of information our advisor shares with our group.

4. I am satisfied with the quality of information our advisor shares with our group.

5. Our advisor is familiar with the goals of our group.

6. Our advisor advises our group in a way consistent with our goals.

7. Our advisor adjusts his/her advising style to meet our needs.

8. Our advisor is a good listener.

9. Our advisor understands the dynamics of our group.

10. Our advisor role models balance and healthy living.

11. Our advisor challenges me to think.

12. Our advisor allows me room to make and execute decisions.

13. Our advisor is able to answer questions and connect our group with resources on campus.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

CREATING AND MANAGING A BUDGET

Preparing a Budget

One of the tasks financial officers face, especially for an organization that makes frequent business transactions, is that of preparing a budget. A budget is a tool used for planning and controlling financial resources. It is a guideline for an organization's future plan of action, expressed in financial terms within a set period of time.

What a budget accomplishes

• It helps refine goals.
• It compels members of the organization to use funds efficiently.
• It provides accurate information to analyze, adjust and evaluate programs and activities.
• It aids in decision making.
• It provides a historical reference to be used for future planning.

Pre-budget considerations

To prepare the budget it helps to know the organization's priorities, objectives, and goals. Upon starting, ask the following questions:

• What is the time period in question (e.g., one semester, entire school year)?
• What does the group want to accomplish most?
• How will this be accomplished?
• How much will it cost?
• What are the funding sources?
Once these questions have been answered, begin preparing your budget.

Preparing your budget

• Determine and record available funds (e.g., carryover balance from previous year).
• Estimate and record expected income and when it will be available (dues, t-shirt sales, etc.).
• Define and record needed expenses (advertising, rentals, printing, supplies, etc.).
• Review, revise, and then assemble into a final budget.
• Have members vote for budget approval.

Managing the budget
The budget must be flexible to anticipate conditions that might have been overlooked during the planning process.

• Set and maintain a minimum balance.
• Formulate general policies and procedures needed to provide internal control (e.g., allow only approved expenditures).
• Keep an accurate written log of financial transactions (income and expenses).
• Periodically and regularly compare the budget to your actual account statement of activity.
• Report financial matters on a regular basis to the organization.

• As the budget period is ending, compare the budgeted amounts to the actual expenditures and revenues.
• Review the data in order to establish priorities for the next budgeted period.
• Begin preparing for the next budget a month or more prior to the conclusion of the current budget period and then begin the process anew.

Financial control
Here are some best practices to prevent fraud.

• Track expenses in one location.
• Require receipts and possibly pre-approval to spend funds.
• Review monthly bank statements: deposits should be made within 24 hours and not made by the person who reconciles the bank statement.
• Segregation of duties (identify who in the organization has what role)
• For questions and more tips, contact the CFO in SG.

ANNUAL BUDGET TOOL

Organization Name: _____
Contact Name: _____
Date: _____

Meeting Cost Expenses			
Items Needed	**Estimated**	**Actual**	**Difference**
Food			
Speakers			
Room Reservations			
Subtotals			

Event Expenses			
Items Needed	**Estimated**	**Actual**	**Difference**
Get on Board Day Swag			
Subtotals			

Office Supply Costs Expenses			
Items Needed	**Estimated**	**Actual**	**Difference**
Printing of Minutes			

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Subtotals			

Publicity Expenses			
Items Needed	**Estimated**	**Actual**	**Difference**
Graphic Design			
Copying/Printing			
Advertisements			
Other			
Subtotals			

Travel Expenses			
Items Needed	**Estimated**	**Actual**	**Difference**
Insurance			
Vehicle Rental			
Lodging			
Food			
Admission			
Incidentals			
Subtotals			

Estimated Expenses	**Estimated**	**Actual**	**Difference**
Totals			

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

STEPS TO SUCCESSFUL PROGRAM PLANNING

• Brainstorm
With your organization, brainstorm a list of programs you would like to provide for the campus community. Make sure to ask other students outside of your organization what they would like to see or experience.

• Choose an Idea
Make sure you have consensus and a broad range of members are committed to the idea.

• Develop Program Goals
Who is your target audience, what are your goals, what are your objectives, etc.?

• Delegate Responsibilities
Involve the members of the organization in the various tasks needed to make sure the program is successful. Depending upon the size of the event, you may need committees or just committed individuals. Make sure new volunteers understand what they're signing on for, and use people's talents and interests to your group's benefit.

• Establish a Budget
Determining your budget will help you decide if you need to seek additional funding, or if your organization can cover the expenses.

• Reserve Program Location
Meet with the staff of the STUDENT CENTERS & EVENTS to tentatively reserve the date and location for your event. Be mindful of access for individuals with disabilities when planning events.

• Contact Performers
If you have an outside performer - speaker, comedian, band, DJ, etc. - that your organization will be paying, it is necessary to have a signed contract. The Student Involvement staff can help you with information and support for this process.

• Consider Waivers, Releases, or Permits
When sponsoring off-campus activities or events involving physical activities, you may want to use a waiver to help reduce liability to your organization. Contact the Student Involvement staff for more information and assistance..

• Plan your Marketing Strategy
Be creative, and plan your publicity to attract the audience you outlined in your program goals.

• Order Catering and Confirm Arrangements
Contact the Student Involvement Financial Associate in the Student Government and Organizations Complex (SGOC) on the 2nd floor of the Student Union at least one week in advance to order any food or beverages for your event. Visit CRES to confirm your room set-up, A/V requirements, and performer arrangements.

• Purchase Decorations and Supplies
Make your event special by putting in the extra touches.

• Pay the Bills
If you received co-sponsorship from other organizations, provide them with the information on actual costs.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

• Thank the People Who Helped
Whether they are members of your organization, people on campus, or outside groups who provided assistance, make sure that they are ready to help you out the next time - thank people personally and/or in writing.

• Evaluate the Program
Ask participants what they thought of the event. Find out from your planning group what went well and what could have gone better. If you utilize SGA funds, you will have to provide an evaluation of the program/event.

• Leave a Record for Next Time
Save information in a binder to pass on to the next generation of your organization. Program planning is made easier when you can build on the success of those who came before you.

EVENT BUDGET TOOL

Organization Name: _____ Event Date: _____
Contact Name: _____ Current Balance: $_____
Event Name: _____   as of (date): _____

Site Expenses

Items Needed	Estimated	Actual	Difference
Room Fees			
Site Staff			
Equipment			
Tables/Chairs/Stage			
Other			
Subtotals			

Decorations

Items Needed	Estimated	Actual	Difference
Flowers			
Lighting			
Balloons			
Paper Supplies			
Other			
Subtotals			

Publicity

Items Needed	Estimated	Actual	Difference

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Items Needed	Estimated	Actual	Difference
Graphic Design			
Copying/Printing			
Advertisements			
Other			
Subtotals			

Food			
Items Needed	**Estimated**	**Actual**	**Difference**
Food			
Beverages			
Staff and Gratuities			
Linens/Dishes/Utensils			
Other			
Subtotals			

Technical Requirements			
Items Needed	**Estimated**	**Actual**	**Difference**
Sound			
Lighting			
DJ Services			
Equipment Rental			
Other			
Subtotals			

Merchandise			
Items Needed	**Estimated**	**Actual**	**Difference**
Awards/Certificates			
Gifts			
Other			
Subtotals			

Miscellaneous			
Items Needed	**Estimated**	**Actual**	**Difference**
Insurance/Permits			
Transportation/Parking			
Security			
Fax/Postage			
Other			
Subtotals			
Total Estimated Expenses	Estimated	Actual	Difference
Totals			

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Income from Admission Tickets

	Estimated	Actual	Difference
Subtotals			

Income from Donations

	Estimated	Actual	Difference
Subtotals			

Estimated Total Income

	Estimated	Actual	Difference
Subtotals			

Totals

Totals	Estimated	Actual	Difference
Total Expenses			
Total Income			
Total Profit/Loss			

RISK MANAGEMENT MATRIX

 This matrix has been provided as an educational tool to help student leaders to develop a process for identifying and discussing potential risk issues. This form is intended for use as part of a larger event planning process, and should only serve as a starting point for your discussion on risk management. It is not designed to take place of a careful review of applicable rules, policies, and laws, or discussion with your advisor. Completion of this form does not imply approval or authorization of your event USFSP.

Complete the following steps.
 1. List all event activities. This could include all aspects of your event not just the general activity.
2. Identify the risks associated with each activity. Remember to think about very specific risks. Examples: External (weather, criminal acts), Organization Specific (contact sport, weapons, climbing), Common Risks (traveling, crowd control, alcohol, hazing), etc.
3. Use the Matrix to assess your activities without using methods to manage your risks. Determine your initial score by finding the intersection with the seriousness and probability of the risk.
4. Brainstorm methods to manage risk. See if you can reduce the probability that something will go wrong.
5. Return to the Matrix to reassess, using the methods to manage risk. Determine your final score by finding the intersection with the seriousness and probability of the risk.
6. Determine whether or not to conduct the event and/or modify/eliminate different activities.

Risk Definitions	Many events, without proper planning, can have unreasonable levels of risk. However, by applying risk management strategies you can reduce the risk to an acceptable level.	
E	Extremely High Risk	Activities in this category contain unacceptable levels of risk, including catastrophic and critical injuries that are highly likely to occur. Organizations should consider whether they should eliminate or modify activities that still have an "E" rating after applying all reasonable risk management strategies.
H	High Risk	Activities in this category contain potentially serious risks that are likely to occur. Application of proactive risk management strategies to reduce the risk is advised. Organizations should consider ways to modify or eliminate unacceptable risks.
M	Moderate Risk	Activities in this category contain some level or risk that is unlikely to occur. Organizations should consider what can be done to manage the risk to prevent any negative outcomes.
L	Low Risk	Activities in this category contain minimal risk and are unlikely to occur. Organizations can proceed with these activities as planned.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Probability That Something Will Go Wrong

Category	Frequent: Likely to occur immediately or in a short period of time, expected to occur frequently	Likely: Quite likely to occur in time	Occasional: May occur in time	Seldom: Not likely to occur, but possible	Unlikely: Unlikely to occur
Catastrophic: May result in death.	E	E	H	H	M
Critical: May cause severe injury, major property damage, significant financial loss, and/or result in negative publicity for the organization and/or institution.	E	H	H	M	L
Marginal: May cause minor injury, illness, property damage, financial loss and/or result in negative publicity for the organization and/or institution.	H	M	M	L	L
Negligible: Hazard presents a minimal threat to safety, health, and well-being of participants; trivial.	M	L	L	L	L

Severity of Risk

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

PARLIAMENTARY PROCEDURE AT A GLANCE

Parliamentary procedure allows an organization to function smoothly in general member meetings. Not everyone will have a lot of experience with it, so here is a very brief overview of the basic rules.

Here are some motions you might make, how to make them, and what to expect of the rules.

To Do This:	You Say This:	May you interrupt the speaker?	Second?	Debatable?	Amended?	Vote Needed?	Can it be re-considered?
Adjourn Meeting	"I move that we move to adjourn"	NO	YES	NO	NO	MAJORITY	NO
Call an Intermission	"I move that we recess for…"	NO	YES	NO (1)	YES	MAJORITY	NO
Complain about heat, noise, etc.	"I rise to a question of privilege	YES	NO	NO	NO	NO VOTE	NO
Temporarily suspend consideration of an issue	"I move to table the motion"	NO	YES	NO	NO	MAJORITY	NO (2)
End debate and amendments	"I move the previous question"	NO	YES	NO	NO	2/3	YES (3)
Postpone discussion for a certain time	"I move to postpone the discussion until…."	NO	YES	YES	YES	MAJORITY	YES
Give Closer study of something	"I move to refer the matter to committee"	NO	YES	YES	YES	MAJORITY	YES (4)
Amend a motion	"I move to amend the motion by…"	NO	YES	YES (5)	YES	MAJORITY	YES
Introduce business	"I move that…"	NO	YES	YES	YES	MAJORITY	YES

**The motions listed above are in order of precedence. Below there is no order. **

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

| To Do this:	You say this:	May you interrupt the speaker?	Second?	Debatable?	Amended?	Vote Needed?	Can it be re-considered?
Protest breach of rules or conduct	"I rise to a point of order"	YES	NO	NO	NO	NO VOTE (6)	NO
Vote on a ruling of the Chair	"I appeal from the chair's decision"	YES	YES	YES	NO	MAJORITY	YES
Suspend rules temporarily	"I move to suspend the rules so that…"	NO	YES	NO	NO	2/3	NO
Avoid considering an improper matter	"I object to consideration of this motion"	YES	NO	NO	NO	2/3 (7)	YES (8)
Verify a voice vote by having members stand	"I call for a division" or "Division"	YES	NO	NO	NO	NO VOTE	NO
Request Information	"Point of Information"	YES	NO	NO	NO	NO VOTE	NO
Take up a matter previously tabled	"I move to take from the table…"	NO	YES	NO	NO	MAJORITY	NO
Reconsider a hasty action	"I move to reconsider the vote on…"	YES	YES	YES (9)	NO	MAJORITY	NO

**Notes

(1) Unless moved when no question is pending
(2) Affirmative votes may not be reconsidered
(3) Unless the vote on question has begun
(4) Unless the committee has already taken up the subject.
(5) Unless the motion to be amended is not debatable
(6) Unless the chair submits to the assembly for decision
(7) A 2/3 vote in <u>negative</u> is needed to prevent consideration of main motion
(8) Only if the main question has not been debated yet.
(9) Unless the motion to be reconsidered is not debatable.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

BOARD OF DIRECTORS

Each leader has a group of people or things that continue to motivate them throughout challenging times. Perhaps you have someone in your family you look up to, or you find a quality in a historical figure that inspires you. It is always important to recognize who you are motivated and inspired by, so you can keep your focus on bettering yourself throughout your leadership journey.

Use the diagram below to create your own Board of Directors or your table of mentors/role models. These people may be people living or dead (or even non-human—one young man previously listed his dog because from the dog he learned unconditional love). They may be people you know personally, or someone that you simply look up to, people in history, etc. Make sure to include a name and the quality that makes them members at your table.

Adapted from the University of North Carolina Charlotte Student Orgs Handbook
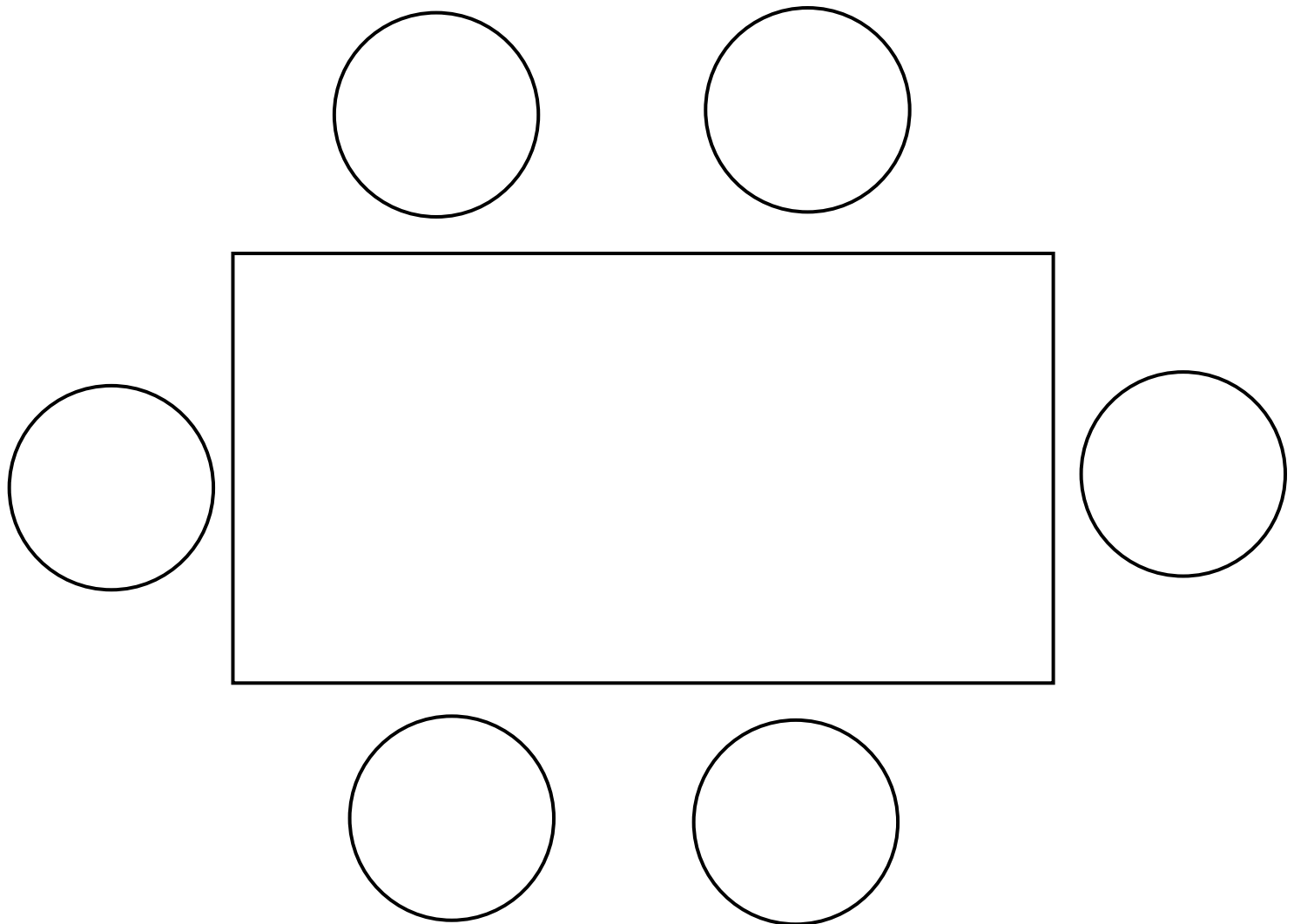
Officer Transition Guide

IMPORTANT CONTACTS LIST

Organization Email: _____ Organization Website: _____

Organization Social Media Accounts: _____

Number of Current Members: _____ Date of Next Election: _____

Advisor Name: _____ Title: _____

Advisor Email: _____ Advisor Phone: _____

Officers

Name: _____ Title: _____ Email: _____ Phone: _____	Name: _____ Title: _____ Email: _____ Phone: _____
Name: _____ Title: _____ Email: _____ Phone: _____	Name: _____ Title: _____ Email: _____ Phone: _____
Name: _____ Title: _____ Email: _____ Phone: _____	Name: _____ Title: _____ Email: _____ Phone: _____

Campus Contacts:

_____ _____

_____ _____

_____ _____

_____ _____

Adapted from the University of North Carolina Charlotte Student Orgs Handbook
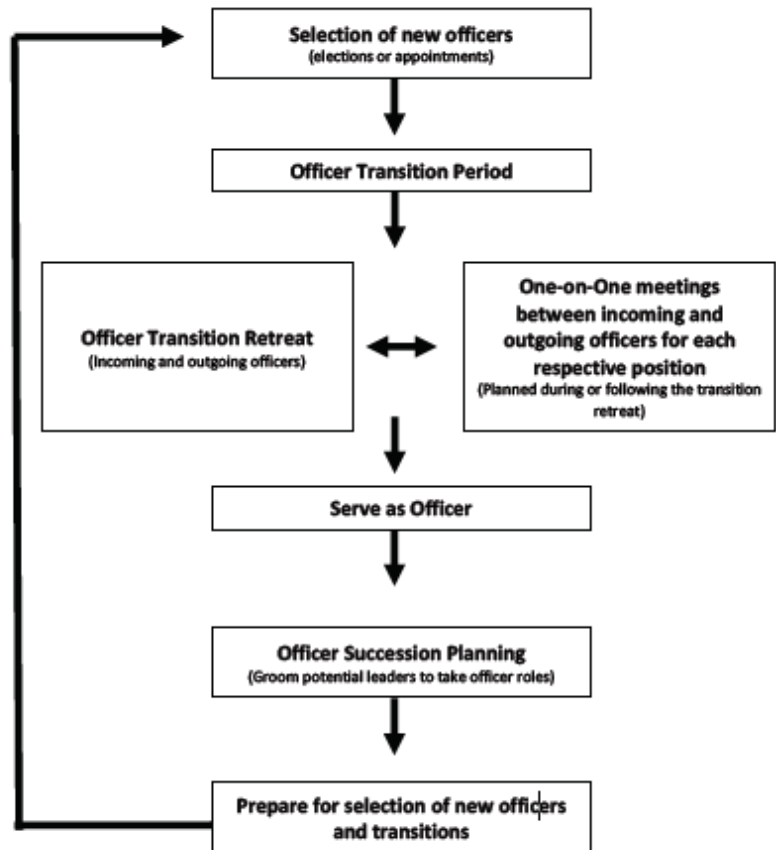
OFFICER TRANSITION OVERVIEW

An officer transition is a period of time between the selection of new officers (elections and/or appointments) and the point at which new officers assume their new role within the organization. Many benefits accompany a successful officer transition. As an outgoing officer, take time to consider how the transmission of information and detailed conversations with the incoming officer contributes to the success of the organization. Transitions provide an opportunity to pass on knowledge and wisdom to future leaders; future leaders gain personal accounts of previous leaders' successes and challenges. The transition process is a reminder of the mission, vision and values of the organization as well as an assessment opportunity to assess previous programs, events, areas of organizational strengths and challenges.

The following are key benefits of an effective officer transition.
- Maintains effective continuity of the group's progress, goals and growth
- Helps ensure the successful transfer of important information
- Helps build upon the achievements of the outgoing officer team
- Reinforces positive/productive communication between officers and between the executive council and the group
- Provides an opportunity for incoming officers to plan for the future and establish new goals
- Creates an atmosphere where officers learn to work together effectively

The following pages provide thoughtful conversation topics and questions to direct you through the transition process. To better understand the importance of transitions, the following is a big picture overview of the officer transition cycle.

Adapted

OUTGOING OFFICER TRANSITION CHECKLIST

To assure an effective officer transition takes place, as the outgoing officer, complete the following checklist thoroughly.

- ☐ Organize all notebooks, binders, files and electronic documents

- ☐ Finish all necessary correspondence (letters, emails, phone calls, etc.)

- ☐ Develop action plans and timelines for new officer transition, including but not limited to:

- ☐ Necessary meetings attended and chaired by officer

- ☐ Important tasks

- ☐ Introduction to key people/staff (relationship building)

- ☐ Complete the Outgoing Officer Questionnaire and review with the incoming officer

- ☐ Complete the Outgoing Officer Goals Worksheet and review with the incoming officer

- ☐ Create/Update officer roles and responsibilities description (should be included in group constitution)

- ☐ Have a one-on-one meeting with the incoming officer

- ☐ Attend the officer transition retreat

OUTGOING & INCOMING OFFICER ONE-ON-ONE MEETINGS

This meeting may be accomplished as a portion of the officer transition retreat or as a follow-up meeting. The following will help guide your conversation by focusing on past accomplishments and providing a critical evaluation of the past year in office.

Agenda

- Responsibilities of the position
- Review the Outgoing Officer Questionnaire
- Transition of the officer information and documents to the incoming officer
- Timeline for completing duties of the position
- Review the Outgoing Officer Goals Worksheet
- Unfinished projects
- Opportunities for improvement
- Important resources and contacts
- Mistakes the outgoing officer made that could have been avoided
- Review Incoming Officer Questionnaire
- Outgoing officer contact information (in case more questions arise)

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

OUTGOING OFFICER QUESTIONNAIRE

To be completed prior to officer transition retreat/one-on-one meetings.

Please think through and respond to the following questions regarding your responsibilities. You will provide this information to your successor.

1. What do I consider to be the greatest responsibility of my office?

2. What were my greatest successes this year?

3. What were the greatest challenges?

4. What were obstacles to performing my position responsibilities effectively?

5. Who or what were good resources for me?

6. What do I wish I had been told before taking the position?

7. What challenges or areas will require attention within the next year?

8. What should be done immediately following the transition/what still needs done?

9. What was the best part about holding this position?

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

IMPORTANT INFORMATION TO TRANSITION

Groups should transition documentation and important information to incoming officers. It is recommended the following items be kept electronically through Google Drive and/or PeteSync tied to your group-specific USFSP account (or other electronic storage options). Outgoing officers should identify who is responsible for transitioning the following materials.

Group Operation Information
- Your group's history (include photographs and digital images, if applicable)
- Yearly Review (including membership review, financial overview, event evaluations, etc.)
- Constitution/Bylaws (including mission and/or purpose statement and officer responsibilities)
- Student group organizational structure (officers, committees, etc.) and roles and responsibilities
- Group information (for example: passwords, membership lists, door access, keys, etc.)
- Calendar with all important dates and/or registration dates for events (for example: annual group events, any reservation dates held by the group, Student Organization Annual Registration dates, priority reservation date, etc.). Google Calendar is a great resource for passing on these dates.
- List of annual procedures, including setting a semester calendar, transferring ownership of bank account, etc.
- Meeting agendas and minutes
- Marketing and promotion materials (for example: logo, posters/advertisements)
- Important contact information and correspondence (contact information for officers, advisors, University departments, organization partners, vendors, etc.)
- Current reservations or agreement documentation (e.g. sponsorship agreements)
- Verbal agreements with partners or vendors for the future
- Goals for the year and progress; where does the group see itself progressing within the next year? Make sure the goals are SMART (use the S.M.A.R.T. Goals section of this handbook to assist)
- Projects that the group has been working on and their progress- is there any unfinished business?
- Details about group storage (inventory of supplies, location of supplies/storage, decorations, costumes, furniture, etc.)

Financial Information
- Budgets
- Receipts/Invoices
- Non-Profit/Tax-Exempt Documentation (if applicable)
- Former SGA Grant Applications
- Banking information (account info, checks, bank statements, Tax ID Number or EIN)

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

SAMPLE 3-HOUR OFFICER TRANSITION RETREAT

AUDIENCE
Incoming and outgoing officers and advisor(s), if applicable.

DURATION
Your individual retreat may vary depending on what activities your group chooses to include. When planning for the meeting, be sure to clearly communicate the time commitment to all participants far enough in advance to avoid scheduling conflicts.

The following is a 3-hour retreat format.

PURPOSE
The meaning of the word "retreat" is to step back or move away from. A transition retreat is an opportunity to step away from normal meeting spaces or campus and to view the group holistically. If you are unable to step away from campus or normal meeting locations, make sure adequate time is allotted for the transition, as well as stressing the importance of the transition opportunity to officers.
An effective officer transition:
•   Maintains effective continuity of the group's progress, goals, and growth
•   Helps ensure the successful transfer of important information
•   Helps build upon the achievements of the outgoing officer team
•   Reinforces positive/productive communication between officers and between the officer team and the group
•   Provides an opportunity for incoming officers to plan for the future and establish new goals
•   Creates an atmosphere where officers learn to work together effectively

Incoming and outgoing presidents or other incoming and outgoing officers as determined by the group are responsible for coordinating all details of the retreat. All officers are expected to attend the officer retreat. The group advisor should receive an invitation to attend the retreat as well, if applicable.

BUDGET
Determine the available funding to host an officer transition retreat. Potential expenses (depending on the group's preferences) may include, but are not limited to: room cost, food, copies, and supplies. Keep in mind, an officer transition retreat can be implemented at no cost.

LOCATION
Regardless of whether you choose to host the meeting on or off campus, it is important to choose a location that is free of distractions and interruptions. When selecting your location, you can consider anywhere from a classroom on campus to a retreat site for the weekend; just be sure to clearly communicate the time commitment to all participants far enough in advance.

MATERIALS AND SUPPLIES

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Notify officers and advisors of the time and location of the retreat as well as what materials to bring. Outgoing officers should bring all materials, notebooks, and information to hand over to incoming officers. Officers should also complete and bring the applicable transition worksheets. Consider technology needs, room set up, etc. and bring copies of the agenda.

FACILITATION

The incoming and outgoing presidents or the responsible officer as identified by the group should prepare to facilitate the retreat. For additional facilitation support, contact the Student Involvement Office to meet with a staff member for facilitation best practices or for a review of the retreat plans. Ensure any disability accommodations are met in the planning process.

SAMPLE 3-HOUR OFFICER TRANSITION RETREAT AGENDA

INTRODUCTIONS, ICEBREAKER & TEAM BUILDER (15 MINUTES)
Use this time to get to know the group. Use an activity that requires participants to move around and talk to one another.

RETREAT GOALS AND EXPECTATIONS (10 MINUTES)
It is vital to establish retreat goals and expectations with the group to maintain effectiveness and efficiency throughout the retreat. Write down the goals and expectations to refer to throughout the meeting as well as at the end of the retreat. What are action items to accomplish during the retreat? What outcomes does the group expect? In addition, set group expectations to ensure everyone is respectful and has fun (examples: be respectful of others' opinions, make sure all voices are heard, have fun, etc.).

ACTIVITY: GROUP JOURNEY ACTIVITY (40 MINUTES)
The goal of this activity is to provide background and historical context to prevent incoming officers from "reinventing the wheel" and instead to help them progressively move the group forward. This activity is a conversation about the history of the student group. The conversation should center on successes and challenges of the group over the past 1-3 years as the knowledge and experience of incoming and outgoing officers allows. Be honest about the past experiences and operations of the group as it is crucial for incoming officers to have a strong understanding of the organization.

REVIEW BUDGET (15 MINUTES)
A critical component of officer transitions is a review of the student group's budget. The outgoing financial officer should facilitate the review of the annual budget to provide the group's financial status. Introduce income sources, estimated expenses, funding opportunities, SGA grant information, etc. The incoming officers should have enough information to review and set the group's annual budget at a later date.

INCOMING & OUTGOING OFFICER CONCLUSION (15 MINUTES)
At this point, outgoing officers should provide final advice and answer questions from incoming officers. Outgoing officers can provide answers to the question, "what is one thing you wish you would have known at the beginning of your term?" The outgoing officers will leave the retreat but the transmission of information and knowledge should not end here. If the officers have not done so already, outgoing and incoming officers must have a one-on-one meeting. Outgoing officers should be available to incoming officers following the retreat. OUTGOING OFFICERS ARE DISMISSED FOLLOWING THIS SECTION

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

TEAM BUILDER (15 MINUTES)
Use this time to get to know your fellow incoming officers. Use an activity that requires participants to move around and talk to one another.

GOAL SETTING (60 MINUTES)
Use the Developing SMART Goals worksheet earlier in this book as a guide. Consider setting goals for all areas of the organization (eg. recruitment, outreach, events, funding, officer transition, membership development and engagement, etc.). Identify an action plan to accomplish the stated goals including a timeline for completion. The plan should be reviewed twice a semester with officers as well as twice per year with the general membership of the student group. The plan should be shared with general membership at least once per semester to assure they are supporting the group's goals. The plan should be created and reviewed in conjunction with the student group's mission, purpose, and values.

REVIEW RETREAT OUTCOMES AND TAKEAWAYS (10 MINUTES)
Wrap up and conclusion is an opportunity to review expectations and goals set at the beginning of the retreat. What was accomplished? What was not accomplished and should be discussed at the next meeting? Take a few minutes to plan ahead as well. Set future meeting times and locations and identify priority actions to be completed soon. Create a plan and expectations for officer communication to ensure success in responsibilities and projects (especially during the summer). Congratulations on your new roles!

CLOSURE AND SAYING GOOD-BYE

The year passes so quickly, and all of a sudden it's time to say good-bye to the friends you've made in your organization. It is often easy to forget about "closing out" the year with your organization. When we take the time to say good-bye, to reflect on and prepare for upcoming transitions in our lives, we often gain a sense of closure or finality and feel better prepared to continue on in life. Here are some ideas to help make saying good-bye a little easier, or at least a little more memorable.

Five D's for successfully dealing with departure
1. Determine ways to make your transitioning a gradual process
2. Discover the significance that different activities have had in your life
3. Describe the significance to others
4. Delight in what you have gained and in what lies ahead of you
5. Define areas of continuity in your life

Five D's for unsuccessfully dealing with departure
1. Deny that it is over
2. Distort your experience by over-glorifying it
3. Denigrate your activities and relationships
4. Distract yourself from thinking about departure
5. Detach yourself abruptly from your activities and relationships

Adapted from the University of North Carolina Charlotte Student Orgs Handbook

Ways to say good-bye

- Have a picnic or pot luck
- Create a photo album, scrapbook, or collage of pictures of everyone
- Have an awards banquet - complete with funny and serious awards
- Write farewell notes/cards to each other
- Give a memento to members - button, shirt, mug, etc. and then have a memento signing party
- Have a graduation party for departing members
- Have a good-bye theme movie night
- Have a slide show of activities from the year
- Evaluate the year and set goals for next year
- Plan a reunion over break or when school resumes
- Create certificates for all members (successfully completing a spectacular year)
- Gather all of the "quotable quotes" or funny things that were said during meetings or programs and
- put it in a book.
- Have a joint retreat with the new officers to share evaluations of the year, answer their questions, and
- give advice.
- Make credit cards for each member (cards that list the good qualities of skills each person has. "I give
- you credit for being a great organizer, for being the peace maker during meetings, etc.")
- Share your favorite memory of the year
- Assemble the group to create a file of what happened over the year

It's important to finish that last chapter in your group's book by finding some way to say good-bye. Keep in mind that not everyone in your group will like sentimental good-byes, so take their feelings into consideration before planning any activities.

NOTES:

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____