

The Advisor's Guidebook

2017

**A mini-handbook for assisting
student organizations**

To New Advisors:

Congratulations on your selection as an advisor to a student organization here at Fredonia. It is an honor to be selected by the students as an advisor; it indicates the students' respect and trust in you. This position can be tremendously rewarding for both you and the students. However, with the position comes several responsibilities. The purpose of this handbook is to assist you in understanding and fulfilling these responsibilities and to provide you with some direction. Should you need further reference or assistance, feel free to contact the Campus Life Office or the Student Association.

To Returning Advisors:

On behalf of the students who participate in Student Association sponsored organizations, thank you for your continued support of co-curricular involvement as an advisor. Your role is an important one; not only do you direct students in their planning of programs and activities, you also serve as a mentor and reference as our students leave Fredonia and enter the world of work. Since many policies and procedures have changed in recent years, this handbook can serve as an additional reference for your organization. If you have any questions regarding current policies, please contact the Campus Life Office or the Student Association.

The Advisor's Handbook
Revised November 2017
by the Campus Life Office
at Fredonia.

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ROLE OF THE ADVISOR

ADVISE: 1. to give advice or opinion to; counsel, 2. to offer as advice; to recommend, 3. to notify; in form, 4. to discuss something and get advice.
(Webster's New World College Dictionary, third edition, 1997)

Using this definition, to advise simply means to guide and nurture a positive set of goals for the club or organization. In other words, to advise can mean:

- To help set an atmosphere where students feel they can voice an opinion or initiate action.
- To offer a broader perspective on issues and problems by sharing your experience and staff expertise.
- To insure that group activities are conducted in accordance with college and state regulations.
- The process in which an individual listens, recommends, informs, and maintains two way communication with another individual or group of individuals. The definition includes the obligation that the advisor will act only in the best interest of the group.

Given the myriad of purposes, activities and objectives of various student organizations, the role of the advisor will vary to some degree between groups. As groups vary in their expectations and needs, it is important you, as an advisor, develop an understanding with the organization you are to represent as to the nature of your involvement. The advisor and group should agree on a set of expectations of one another from the onset and may even wish to write this list down as a contract between the group and the advisor. The following list and the checklist on pages 6 & 7 include many basic expectations for an advisor and might provide some direction for such a contract.

- Regularly attend general and executive board meetings; if you can only attend one, it is recommended you attend executive meetings. Attend group activities and functions and assist when necessary.
- Serve as a resource for planning and organizing, as well as providing knowledge of the campus and community.
- Become familiar with the purpose and structure of the organization by reviewing the constitution and bylaws.
- Familiarize yourself with the group's financial structure, from where the treasury is derived (dues, fundraising, Student Association, etc.), for what the money is used, and how the money is budgeted; assist in budget development and execution.
- Familiarize yourself with Student Association guidelines, including SA recognition and guidelines for disbursements and reallocations.
- Explain and enforce university policies when necessary, including policies on posting, hazing, and alcohol.
- Be familiar with the university facilities, services, resources and procedures that might affect or be of benefit to the organization. Function as a liaison between the organization and the campus administration and assist the group in developing an ongoing, beneficial relationship with the college.
- Supervise the transition of officers and assist in new officer training and leadership development. Ensure that officers know and understand the obligations of their position and that they are working to fulfill these obligations.

Once again, this list is not meant to be totally inclusive or applicable to every organization, but may serve as a guideline when determining the role you will play.

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

RESPONSIBILITIES OF AN ADVISOR TO THE STUDENT ORGANIZATION

As an advisor, you should be **N.I.C.E.**

NAVIGATE Order

- Insure that meetings are properly scheduled. You should serve as a resource person at executive and group meetings as well as attend social and special functions of your organization.
- Assist with the formulation and revision of the constitution and by-laws.
- Encourage and assist your organization in the setting of group goals. You should also assist in the planning and implementation of a well-balanced program of activities.
- Work with the officers to promote an efficient and effective administration for the organization.
- Assist the treasurer in maintaining accurate accounting procedures and in formulating an annual budget.

INVEST in the Group's Growth

- Be a facilitator of creativity and innovation for the group.
- Let your organization make mistakes. Even though it may be difficult to watch your group make errors, it is a vital part of the learning process every group must go through.
- If you become bored with your position as advisor or find that you no longer have the time to fully carry out your responsibilities, then determine whether or not you want to continue to serve as an advisor.
- In the event you must resign your position as advisor, you should:
 1. Inform the organization of your decision....yourself.
 2. Assist, if asked, the group in finding a new advisor.

COMMUNICATE and connect

- Each advisor should be prepared to give positive as well as negative feedback to the organization.
- There may be times when you will have to intervene in the group to help solve inner-group conflict.

Be the EXPERT

- As an advisor, you should be aware of and be able to interpret university policies and any regulations that govern a student organization. There may be occasions where you will have to advise your group on the legal ramifications of an event or activity.

RESPONSIBILITIES OF GROUP MEMBERS TO THEIR ADVISOR

- An advisor should be recognized as an integral part of the group; he/she is not just a member. Therefore, additional considerations should be extended.
- An advisor should be welcomed at all meetings and social events, and thanked for coming at the close of the event.
- Group and executive board meetings should be planned at a time when the advisor is able to attend.
- The group should inform their advisor of all organizational activities and extend an invitation for him to attend.
- An organization should ask their advisor for her/his opinion and advice when problems come up within the organization.
- Organizational officers must keep their advisor fully informed of the programs and activities of the organization, and the progress being made in carrying out plans.

ADVISOR CHECKLIST

Listed below are some expectations student leaders have of their advisor. This form is designed to help advisors and student officers arrive at a clear and mutually agreed upon view of the role of the advisor within the student organization. The advisor and each officer should respond to the following items and meet to compare their answers and “iron out” any differences. For some items, particularly those roles that are not the advisors, it will be helpful to clarify which officer will handle the given task.

For each of the following statements, respond on a scale from 1 to 5 where:

1= Essential for advisor to do

2= Helpful for advisor to do

3= Nice but advisor does not have to do

4= Would prefer advisor didn't do

5= Absolutely not the advisor's role

- Attend all general meetings.
- Attend all executive board meetings.
- Call meetings of the executive board when he/she thinks it's necessary
- Explain University Policy when relevant to the discussion.
- Explain University policy to executive board and depend upon the officers to carry them out.
- Explain University policy to the entire membership at a general meeting once a year.
- Reserve an appointment with the President or Chair before each meeting.
- Help the President prepare the agenda before each meeting.
- Serve as parliamentarian for the group.
- Speak up during discussion when he/she has relevant information.
- Speak up during discussion when he/she believes the group may make a poor decision.
- Be quiet during general meetings unless called upon.
- Exert his/her influence with officers between meetings.
- Take an active part in formulating the goals of the group.
- Initiate ideas for discussion when he/she believes they will help the group.
- Be one of the groups except for voting and holding office.
- Attend all group activities.
- Request to see the treasurer's spreadsheets at the end of the semester.
- Check the secretary's minutes before they are written in final form.
- Check all official correspondence before it is sent.
- Get a copy of all official correspondence.
- Be a custodian of group materials, records, etc. during the summer, and transition of officers
- Keep the official files in his/her office.
- Inform the group of infractions of their by-laws, codes, standing rules, and constitution.
- Keep the group aware of its objectives and/or mission statement when planning programs.

- Veto a decision if it violates stated objectives, by-laws, standing rules, constitution, or policy.
- Mediate interpersonal conflicts that arise.
- Be responsible for planning leadership skills workshops.
- State what his/her responsibilities are, or as he/she sees them at the beginning of the year.
- Let the group work out its problems including making mistakes and “doing it the hard way.”
- Insist on an evaluation of each activity by those students responsible for planning it.
- Take the initiative in creating teamwork and cooperation among the officer’s group.
- Let the group thrive on its merits; do not interfere unless requested to do so.
- Represent the group in any conflicts with members of the University staff.
- Be familiar with University facilities, services and procedures which affect group activities.
- Recommend programs, events, speakers, etc.
- Take an active part in the orderly transition of responsibilities between old and new officers.
- Cancel any activities which he/she believes have been inadequately planned.
- Put up posters for an event the group has planned

LEGAL LIABILITIES OF THE ADVISOR

The legal liabilities of a student organization advisor are not clearly defined. Since liability is most often based on negligence, it is your responsibility to be fully aware of SUNY and university policy, pertinent state and local laws, and the actions and activities of the organization you are representing. If you have made every effort within your power to avoid possible negligence, and have gone on record as doing so, your personal liability should, in most cases, be minimal.

In addition, if you are an employee of the State, and you have acted in good faith to uphold SUNY and College policies and State and Federal laws, you will be protected under Section 17 of the New York State Public Officers Law. Under this law you would be defended by the Attorney General Office in any lawsuit brought against you for an act committed in your professional capacity. In the event of a successful lawsuit, any judgment rendered against you would be paid by the State.

Some important things to remember:

- The university accepts no liability for events that occur off campus. This includes open parties where alcohol may be served to minors. However, as a College employee, you are legally bound to report any illegal activities such as open parties or hazing.
- As an advisor/coach of a club sport team and as an employee of the university, you should be covered under Section 17, as long as you act in a responsible manner.
- You should not be liable for anything printed or broadcast by a student organization, but you are responsible for making that organization’s leadership aware of the possibility of liability involved in their actions.
- Again, should you be acting in good faith to prevent violations of law or policy, your liability should be minimal. You are encouraged to maintain regular communication with the group you advise, and to take action to ensure that such violations do not occur.

CAMPUS POLICIES AND GUIDELINES QUICK REFERENCE

The following policies are of particular interest to student organizations. We encourage advisors to be familiar and recognize how they impact the student organization in which they assist. Please direct questions regarding these policies to the university department or office listed next to each one.

- **Alcohol and Drug Policy** (Student Conduct)
<http://students.fredonia.edu/studentconduct/policies#alcohol>
- **Burning of Candles in Buildings on Campus** (Campus Life)
<http://www.fredonia.edu/policy>
- **Child Protection Policy** (Campus Life)
http://fa.fredonia.edu/sites/fa/files/section/humanresources/files/ChildProtectionPolicy2015_03_13.pdf
- **Food Service Policy** (Campus Life)
<http://www.fredonia.edu/policy>
- **Fraternity and Sorority Recognition** (Campus Life)
http://www.fredonia.edu/policy/SA_policy.asp
- **Greek Recruitment** (Campus Life)
<http://www.fredonia.edu/policy>
- **Hazing and Initiation or Affiliation with any Organization** (Student Conduct)
<http://students.fredonia.edu/studentconduct/policies#hazing>
- **Large Performance Events** (Campus Life)
<http://www.fredonia.edu/campuslife/CampusLifePolicies.asp>
- **Posting Policy** (Campus Life)
<http://www.fredonia.edu/campuslife/CampusLifePolicies.asp>
- **Student Association-Financial Policies & Procedures** (Student Association)
http://www.fredonia.edu/policy/SA_policy.asp
- **Vending Policy-Credit Card Vendors** (Campus Life)
<http://www.fredonia.edu/policy>
- **Movie Copyright** (Campus Life)
<http://www.swank.com/college/copyright.html>

IMPORTANT CONTACTS

Campus Life Office

673-3143

Reserve rooms in academic buildings, Williams Center, and outdoor areas, posters approved and stamped, lost and found, fundraising and sales permits, public performance guidance, activities, and leadership programs.

Intercultural Center

673-3398

Multicultural resources, diversity workshops.

Assistant Director of Athletics (Recreation & Facilities)

673-3542

Oversees the usage of fields and indoor facilities for Dods and Steele Halls.

Faculty Student Association

680-6227

Catering, College Lodge, Alumni House reservations.

Rockefeller Arts Center

673-3217

Reserves space in King Concert Hall, Marvel and Bartlett Theaters.

Enrollment and Student Services

673-3271

Vice President for Enrollment and Student Services.
Student's rights and expectations, campus policies, and FERPA.

Student Association

673-3381

Oversees all student organizations, off-campus housing information, campus and community bus service.

Ticket Office

673-3501

Tickets for events, charter bus service, cash box rentals.

Volunteer and Community Services Coordinator

673-3690

Opportunities for volunteer work/projects on and off campus, place to record service learning experience and service hours.

COMMON “HOW TO” QUESTIONS

SELL SOMETHING ON CAMPUS

All Student Association recognized organizations are eligible to conduct fundraising activities on campus. Reservations for all fundraising activities must be made in the Campus Life Office in the Williams Center. Space is reserved on a first-come, first-served basis. All reservations should be made **in advance** to ensure availability. Proceeds from all sales must be deposited into the sponsoring organization’s account. As the Advisor, you will be required to sign a “Sales Permit” agreeing to this condition. This form must be submitted, in advance, to the Campus Life Office. **This form is required before reserving a vending space** or to conduct any sale on campus, and must be present at the vending table during sale times. A tax I.D. number will be required for all off campus vendors. The Advisor will receive a copy of the completed permit of their records. The Campus Life Office reserves the right to deny any sale that duplicates university services.

ROOM/SPACE RESERVATIONS

To reserve rooms in any academic building or the Williams Center, organizations should contact the Campus Life Office. All reservations should be made well in advance. The Campus Life Office can not be held responsible for an organization’s failure to properly reserve facilities. For major activities and events, groups are encouraged to make their reservations as soon as plans are set.

For events in the Williams Center which require special set ups or arrangements, a “Facilities Request Form” must be completed and submitted at least two weeks prior to the event and submitted to the Campus Life Office. An Odd Jobs crew will be hired at the expense of the sponsoring organization to properly set up for the event and reset the area upon completion of the program.

FLYERS/POSTERS APPROVED

All items for posting on campus must be approved first at the Campus Life Office in the Williams Center. It is best to get the publicity material approved and stamped before they are duplicated. Postings are only permitted on public bulletin boards, not on walls, floors, doors or windows. Flyers may be posted on faculty, staff, and resident assistant bulletin boards only with the permission of the individual.

SPONSOR A VENDOR

Many independent businesses or “vendors” are willing to set up a sales table in the Williams Center and share a percentage of their earnings with a sponsoring student organization. This can provide a relatively simple fund raising opportunity for student groups. All such vendors are required to have a campus sponsor to conduct sales on university property. Organizations are responsible for contacting the individual vendor they wish to sponsor. The Campus Life Office has the names and phone numbers of several possible vendors on file and student organizations may look through the information to identify possible vendors. Vending dates must be reserved with the Campus Life office and a Sales Permit must be completed with the vendor’s NY State sales tax ID number before the vendor can sell their items.

Vendors are required to pay a space fee to the Campus Life office and groups are responsible for negotiating their percentage of the profits with the vendor, typically 10% of the total sales.

TICKETS PRINTED FOR MY EVENT

The Ticket Office, located in the Williams Center, will print tickets for student organizations at no charge. Requests should be made in person at least two weeks prior to the event. The Ticket Office can also assist student organization in arranging for charter bus service and cash box rentals. All events held on campus that require an admission fee must go through the Ticket Office for ticketing.

LOG ONTO BLUE NEWS

All faculty and staff members have an account waiting for them on BLUE NEWS. All one has to do is log-in using their Fredonia assigned username and password. The first time you log in the software will ask you to personalize your account. For more information on how to use BLUE NEWS please contact the Office of Campus Life.

ASSISTANCE WITH BLUE NEWS

There are many functions available to assist groups maintain good records, advertise events, and communicate better with club members. Should you or organization need assistance with the site or managing their club page, please contact the Campus Life Office during regular business hours. It is mandatory that all groups register on BLUE NEWS and update their group roster once a semester in order to make room reservations, borrow equipment, and post flyers on campus.

RE-RECOGNITION BY THE STUDENT ASSOCIATION

To renew recognition, a representative must make an appointment with the Vice President of the Student Association to appear at the Rules Committee meeting. The Rules Committee will then vote to recommend or not to recommend the group to the General Assembly for re-acknowledgement. The group representative must then attend the General Assembly meeting where the official vote on the group's recognition will be taken. The representative should be prepared to answer questions concerning the group at both meetings. All SA sponsored groups must renew their recognition on an annual basis.

RESERVE ATHLETIC SPACES

The Assistant Director of Athletics (Recreation & Facilities), Megan Valentine oversees the use of all indoor and outdoor athletic facilities/spaces. In most cases, the department will require that the club advisor or a faculty/representative be present when using these spaces. Student organizations need to request space well in advance.

FOOD SERVICE

All student organizations are required to contract FSA via the FSA Catering Office located in University Commons for food service at all events that are open and advertised to the any members of the campus and or local community . However, a student organizations' private club meetings in which only members of the group are gathering without advertising food at such meeting may bring in food from an off campus vendor. For example, a club may order a pizza from Blasdell Pizza for their e-board meeting, but they can not serve Blasdell pizza at an Open Mic Night event to all those that attend. It is also possible for a group to hold a special fundraiser in which an outside vendor is used (ie. Chivetta's for a Chicken BBQ fundraiser), however the group must contact the FSA catering office and complete the appropriate paperwork.

SIGNING CONTRACTS

If a contract is required for an activity involving a Student Association sponsored group, the Student Association General Manager is the only individual authorized to sign. Any other contract on campus must be signed by the Vice President of Administration, the President's official designee. If the event is to be held within the Williams Center, the Director of Campus Life must also approve the contract. If the event is to occur in one of the outside areas on campus, the organization must complete an Outdoor Event Form and register the event with the Campus Life Office.

PUBLICIZE EVENTS ON CAMPUS

Other than flyers, groups may also advertise events on WCVF, the campus radio station, WNYF, the campus television station, and in the Campus Report through the Office of Public Relations. Groups can also request to post information on the TVs located in all of the major buildings via the Campus Life Office.

ADVISING ADVICE

The position of advisor can be a challenging one and we appreciate the effort you make on behalf of the students. Should you need assistance or support, the Campus Life office is ready and willing to assist you to the best of our abilities. We can offer resource materials, contacts and considerable information and experience in working with student organizations. Please feel free to contact us should you need more information or assistance.

THE STUDENT ASSOCIATION

The following information has been compiled by the Student Association to assist you in your dealings with SA sponsored organizations. Should you have any questions regarding this material, please contact the Student Association at 673-3381.

RESPONSIBILITY OF THE ADVISOR

In accordance with the SUNY Administrative Policies for Fees, Rentals and Other Charges – Student Activity Fee (Item 053), all organizations must have approval for expenditures by the advisor.

Although the advisor's objective should not be to control the organization, the advisor does routinely offer guidance on monetary, administrative and operational issues. In most cases the advisor for the organization will be the only continuity that is present. The Association has wide array of organizations, therefore, it is also common that the General Manager of the Association will seek advice from the advisor of a particular organization.

In any case, communication between the SA administrative office and the advisor will strengthen the achievements of any organization. If you have any questions the Association will be able to assist you in finding the answer. The Association is staffed with a full time General Manager/Accountant, Administrative Assistant, Executive Secretary and part-time legal staff. In addition, there are elected student officials who have detailed knowledge of the SA and its operational guidelines who are available to assist you. The Student Association is located in G-107 of the Williams Center and can be reached at 673-3381. The office hours are from 9:00am-5:00pm Monday through Friday.

TYPES OF GROUPS

There are five types of groups within the Student Association:

Constituted Groups:

This form of recognition may be only granted to organizations that have previously been acknowledged for one and chartered for six or more consecutive academic years, that are not similar in purpose or function to an existing constituted group, that are educationally, informational, instructionally, entertainment-oriented, or provide a needed service to the Association, and that wish to exist as an organization for the purpose of providing activities intended to serve the members of the Association. These groups are financially dependent on SA and receive funding via budget and the Con & Con Account (\$1500 max in any year from Con & Con).

Chartered Groups:

This form of recognition may be only granted to any group of fee-paying students that has been acknowledged for at least one year and wishes to exist as an organization for the purpose of providing activities intended primarily to serve the members of the organization. These groups are financially independent on SA and receive funding via Allocation and Con & Con Account. **Not to exceed \$1500.00 in any academic year.**

During the first year of recognition the group is allowed the following funds:

\$1500.00 if chartered during the 1st quarter of the year

\$1375.00 if chartered during the 2nd quarter of the year

\$1250.00 if chartered during the 3rd quarter of the year

\$1125.00 if chartered during the 4th quarter of the year.

Acknowledged Groups:

This form of recognition may be granted to any group of fee-paying students. The following type of groups **MUST** be recognized only through acknowledgement:

Any organization that practices discrimination in membership in any manner other than the screening of individuals for membership into a group that is directly involved with confidential student information, or the safety of the student body. Social fraternities and sororities, honorary groups, or any group which maintains exclusive membership. These groups are financially independent on SA and receive funding via Allocation and Con & Con Account. **Not to exceed \$1000.00 in any academic year.**

During the first year of recognition the group is allowed the following funds:

- \$1000.00 if acknowledged during the 1st quarter of the year*
- \$750.00 if acknowledged during the 2nd quarter of the year*
- \$500.00 if acknowledged during the 3rd quarter of the year*
- \$250.00 if acknowledged during the 4th quarter of the year.*

Provisional Groups:

These groups are financially independent on SA and receive funding via Allocation and Con & Con Account. . **Not to exceed \$500.00 in any academic year.**

During the first year of recognition the group is allowed the following funds:

- \$500.00 if endorsed during the 1st quarter of the year*
- \$375.00 if endorsed during the 2nd quarter of the year*
- \$250.00 if endorsed during the 3rd quarter of the year*
- \$125.00 if endorsed during the 4th quarter of the year*

Endorsed Groups:

These groups are financially independent on SA and receive funding via Allocation and Con & Con Account. . **Not to exceed \$150.00 in any academic year.**

During the first year of recognition the group is allowed the following funds:

- \$150.00 if endorsed during the 1st quarter of the year*
- \$125.00 if endorsed during the 2nd quarter of the year*
- \$100.00 if endorsed during the 3rd quarter of the year*
- \$75.00 if endorsed during the 4th quarter of the year*

OBTAINING STUDENT ASSOCIATION RECOGNITION

All student groups, in order to utilize campus facilities and qualify for funding through the Student Association must obtain recognition through the Association. To gain this recognition, a representative should first make an appointment with the Speaker of the Assembly to discuss the recognition process and requirements. One such requirement will be an organization doctrine, which must be completed by the organization and submitted to the Speaker of the Assembly.

Listed below are the necessary components of an SA doctrine. Feel free to place any additional clauses in your doctrine that you deem necessary for the functioning of your organization.

- I. Name: State the full name of the organization.
- II. Purpose: A brief statement outlining the reason for your organization's existence.
- III. Membership: The standard clause reads as follows: "Membership is open to all fee-paying students, faculty and staff of the SUNY College at Fredonia."
- IV. Advisement: The standard clause reads as follows: "An advisor shall be chosen from the faculty and staff of the SUNY College at Fredonia."
- V. Executive Board: Here you will need to outline the formal structure of your organization. You may want to include the various officers, chairs of any committees, and so on. you may also want to outline the responsibilities that each officer will have.
- VI. Meetings: here you will want to state the frequency of your meetings (i.e. once a month, once a week).
- VII. Finances: This clause must read as follows: "(Name of organization) shall be financially independent of the Student Association." (for chartered and acknowledged groups . Constituted groups should read "dependent."

- VIII. Responsibility Clause: This clause must read as follows: “Whereas the (name of organization) understands it is their responsibility to meet with the Speaker of the Assembly at the beginning of each semester, it is the responsibility of their executives to be familiar with this (name of organization) and to abide by the Constitution and Statutes of the Student Association.”

Once the doctrine has been completed, the group will be scheduled to be reviewed at a Rules Committee meeting. A representative of the organization must be present at this meeting and should be prepared to answer any questions the committee members may have concerning the organization. The Rules Committee will then vote on a recommendation for the General Assembly. As a final step, the General Assembly must approve the organization. Again the recognition will be part of the meeting agenda and a representative of the organization must be present to answer questions. The Assembly will vote at their meeting on whether or not to recognize the organization based on the charter, the recommendation of the Rules Committee and responses of the representative to Assembly members’ questions. Once a group is recognized they are then eligible for all Student Association benefits and may utilize campus facilities. All SA recognized organizations must be re-acknowledged on an annual basis.

ORGANIZATIONAL FINANCES

The Student Association recognizes five types of organizations; constituted, chartered, and acknowledged. Each type, if in good standing, is eligible for funding from the mandatory student activity fee. Regardless of the level of funding the Association offers accounting services to all organizations.

Advisors should refer to the Student Association Financial Policies and Procedures Manual posted on the FSU4U in the document section of the Campus Life Office organization page. It can be found at <https://fsu4u.fredonia.edu/organization/office-of-campus-life/documentlibrary>. The following is a quick reference for some of the most popular financial procedures used by student organizations:

FORMS

Turn in all forms EARLY!

Request Forms (blue):

Over \$150: turn in by **Tuesday afternoon** (before 2:00pm)

Less than \$150: turn in anytime

Requisition Forms (green):

Must be turned in **3-5 BUSINESS days** before you need to make the purchase.

Contract (yellow):

Must be turned in **at least 2 WEEKS before** the start date of the event.

THE BUDGET AND APPROPRIATION’S PROCESS

(Must go through this process when requesting money over \$150.00)

- Must turn in a request form (blue) **by Tuesday afternoon** (before 2:00pm) to be on that Tuesday night’s agenda. I will email each group Tuesday by 3:00pm reminding them they are on the agenda and of the place and time. Attend B&A Tuesday at 5:00pm. B&A meetings are held every **Tuesday at 5:00pm in G103A in the Williams Center**.
- If an amount over \$150.00 is approved you must attend the General Assembly (GA) meeting **Thursday at 5:30pm in G24 McEwen**. This is the final approval, so once your group is approved on Thursday the money will be released into your account.
- Beginning Friday morning you may turn in requisition forms (green) to begin using the money that was released to your group.
- All together this process takes place Tuesday-Friday. **Requisitions take an additional 3-5 business days after they are turned in to be processed, so please plan ahead when requesting money!**
- It does not necessarily have to be president or treasurer who attend these meetings, but please send a member who is knowledgeable of the request to both meetings.

REIMBURSEMENTS

There are NO REIMBURSEMENTS unless approved prior to event.

Approvals are only given for gas reimbursements and extreme circumstances. These circumstances DO NOT include failure to turn in paperwork in a timely manner.

- **Gas reimbursements:** If your group members are taking an SA van, you do not need to see the Comptroller prior to the trip, just fill out a requisition for the gas you put into the van. If your group members are taking their own vehicles, you **MUST** see the Comptroller during office hours **prior** to leaving for your trip. The student association reimburses a group at a rate of \$0.14 per mile out of the group's account.

Never pay for something for your group out of your own pocket since you will not be reimbursed!
Make sure you always have a Purchase Order before purchasing ANYTHING!

PURCHASES

- You must turn in a requisition form (green) 3-5 business days prior to needing to purchase the item(s).
- Pick up purchase order from Michelle Corrente in the Student Association office Monday-Friday between 9:00am-5:00pm.
- Take purchase order to store and give to cashier to sign. The company may keep the bottom copy (yellow) as indicated on the bottom of the purchase order.
- Return other copies of the purchase order to Michelle Corrente along with the receipt in a timely manner.
- **Purchasing T-shirts :** When purchasing t-shirts DO NOT place an order before having a purchase order in hand. You may call and ask for pricing, but never place the order until after paperwork is in place. T-shirt designs must be approved by Trademark and Licensing on campus prior to ordering.

ADDITIONAL IMPORTANT STUDENT ASSOCIATION REQUIREMENTS

- All group president's and treasurers are required to attend the Fall Summit and the Spring Summit each semester. These summits are half day retreats that outline important policies and procedures mandated by the Student Association. While advisors are not required to attend, they are welcome.
- All groups are required to attend the Student Association General Assembly meetings on Thursday at 5:30pm in McEwen Hall.
- All groups are required to fill out a Signature Form at the beginning of each semester. This is used to make sure all signatures on forms turned into the SA office are legitimate. Advisors are required to sign this form as well.
- All groups are required to complete a Event Sheet following an activity or event they have planned. It serves as a summary of the event and record of attendance.
- Groups are not required to, but are encouraged to attend Activities Night each semester. Activities Night takes place on the second Wednesday of the semester and begins at 6:30pm or 7pm. Groups may fill out a form on the Campus Life website in order to secure a whole or half size table. Forms must be completed by and received by Spectrum Entertainment Board by the Monday morning prior to Activities Nights. New organizations that are not yet recognized by SA may receive "Temporary Acknowledgement" for the event just to see if there is interest in that group by the general student population. Those new groups would need to speak to the Vice President of SA for permission prior to Spectrum Entertainment Board assigning them a table.

Facilities Request Form

Multipurpose Room Williams Center

Request Form must be registered and approved at least **TWO WEEKS** prior to the date of the event.

* Only the representative listed below may make changes to this form. This representative will be responsible for understanding and following all Fredonia policies. Changes must be made at least 24 hours prior to the start of the set up. Organizations that fail to notify us of an event cancellation 24 hours in advance will be billed for Odd Jobs Services.

Date of Event _____

Event Name _____

Sponsoring Organization _____

Representative's Name _____

Representative's Phone Number _____

Approved

Date _____

Staff _____

Office Use Only

Event Times:

Setup _____ Event Time _____ Tear Down _____

EXAMPLE

Campus Event Information

description of

Performer Contract Required Yes No

If a contract is required for bands or performers, then it must be approved by the Director of Campus Life. This approval will occur at the time of registering the event. It is the responsibility of the organization to provide the Office of Campus Life with a copy of the contract, rider, and any other pertinent information.

Admission Price \$ _____ Student \$ _____ General Public

Free, Open to Public

Free, Limited to Campus staff, students, and employees

Ticket Capacity _____ *(To be determined by Campus Life Office)*

Organizations wishing to charge admission for events in the Williams Center must contact the **Central Ticket Office** from more information.

Performers: _____
Performer's Website _____

*Events will be publicized via the EMS Campus Events Calendars

**Office Use Only
Special Notes:**

CAMPUS LIFE SALES PERMIT

Please Note:

Your vending reservation is not confirmed until a sales permit form has been completed and signed by a Campus Life representative. **Completed Sales Permit Forms must be submitted to Campus Life one week prior to the sale.**

To be completed by Faculty Advisor

To: Campus Life

From: _____
Faculty Advisor (please print)

I am aware of the proposed sales event listed below and certify that all proceeds from this sale will be placed in the organization's account. Proceeds will be used to benefit the entire membership of the student organization listed as campus sponsor.

Signed: _____

Date: _____

EXAMPLE

To be completed by Campus Sponsor

SALES PERMIT

SUNY COLLEGE at FREDONIA

Vendor: _____ NYS Tax #: _____

Campus Sponsor: _____

Vending Dates: From ____ / ____ / ____ To ____ / ____ / ____

Sale Items: _____

To be completed by Campus Life

Campus Life Representative

Date

A copy of this form must be displayed at the sales location

Date: _____

P.O.#: _____

REQUISITION ORDER FORM

OFFICE OF THE STUDENT ASSOCIATION COMPTROLLER

Vendor Name: _____

Vendor Address: _____

Organization Name: _____

Account Number: _____

Description: (Please be detailed)

EXAMPLE

Amount: \$ _____

Group Treasurer

Faculty Advisor

OFFICE USE ONLY

Approved by: _____

Comptroller/Accountant

Date Approved

Received by: _____

Date: _____

Request Form

Office of the Student Association Comptroller

RELEASE REQUEST *(Circle One)* RE-ALLOCATION REQUEST

FROM: Allocation Account _____

FROM: _____
(Line Item #)

Con. & Con. Account _____

TO: _____
(Line Item #)

Name of Organization: _____

Amount of Request: \$ _____

Type of Organization: Acknowledged _____
Chartered _____
Constituted _____

Reason for Request: *(please type)* _____

EXAMPLE

Signature of President

Signature of Treasurer

Campus Life Staff 716-673-3143

- Mark Suida Director
- Rachel Martin Assistant Director (Student Activities)
- Joyce Smith Volunteer and Community Service Coordinator
- Lisa Noody Secretary and room reservationist

Student Association 716-673-3381

- Vince Gugino General Manager
- Kathy Carrus Executive Assistant
- Michelle Corrente Executive Secretary