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**DISCLAIMER:**
Some of the policies, procedures and other information outlined in this handbook might change throughout the year. Student organization leaders, members and advisors are encouraged to check with the relevant office to ensure you have the most up-to-date information.
Dear Student Leaders:

Student organizations are an integral part of campus life and student engagement at the University of North Carolina at Charlotte. 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 UNC Charlotte, 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 Student Involvement Office 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 Student Involvement team 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 being a role model for our community.

Contact information for individual student organization staff are listed below. Please do not hesitate to reach out for advice or questions. We are here to support you and your organization.

Sincerely,
Student Organizations staff

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STARTING AND MAINTAINING A STUDENT ORGANIZATION
WHAT IS A STUDENT ORGANIZATION?

A student organization is defined as a group of currently enrolled University of North Carolina at Charlotte students 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 percent of the membership are currently enrolled students. Only currently enrolled students can serve as officers or vote on organizational matters. UNC Charlotte recognizes the vital contributions that student organizations make to the quality of life on campus; however, recognition as a UNC Charlotte student organization is not to be interpreted as an endorsement, approval, or reflection of the mission, purpose, and/or activities of UNC Charlotte 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 under the Student Government Association Act for Registration.

GOVERNANCE AND CLASSIFICATION

All student organizations are governed by the Student Government Association (SGA) and the Senate Organizational Ways and Means Committee. The following are the categories that all student organizations fall under:

- **Academic/Pre-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.
- **Fraternity & Sorority**: Traditionally known as Greek-letter fraternities and sororities, these academic and service-oriented groups work to foster the ideals of friendship and the development of character.
- **Graduate**: Organizations designed specifically to meet the needs of graduate students in their specific areas of study or interest.
- **Honor Society**: Local and national honor societies that provide service and/or leadership opportunities and recognition for students with academic honors.
- **Interest**: Organizations that exist to enhance campus life and to provide support to students through a variety of programs and events.
- **International**: Focused on providing support, knowledge, and awareness through interactions and discussions of international culture, language, and people in the global community.
- **Media**: Main purpose is education about and production of mass communication.
- **Multicultural**: Focused on providing support and fostering community within the various cultures, races, religions, and orientations represented among the student body.
- **Performance**: 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.
- **Religious/Spiritual**: Groups that provide spiritual and/or religious development and support.
- **Service**: Organizations that provide volunteer opportunities for civic-minded students eager to serve the campus and/or community.
- **Sport Club**: Groups that encourage participation in and promotion of team sports, physical fitness, health and wellness, as well as leisure and special interest activities.
INFORMATION NECESSARY FOR ONLINE REGISTRATION

#1. Returning or New Student Organization (*Groups are new only if they have not been previously approved by SGA.)

#2. Provide Full Organization Name (No acronyms or abbreviations; do not put “UNC Charlotte” or “UNCC” in front of name.)

#3. Provide Abbreviated Organization Name (if applicable)

#4. Select a Category from the list below. These categories are designated only for student organizations.

<table>
<thead>
<tr>
<th>Academic/Pre-Professional</th>
<th>Fraternity &amp; Sorority</th>
<th>Graduate</th>
<th>Honor Society</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>Media</td>
<td>Multicultural</td>
<td>Performance</td>
<td>Political</td>
</tr>
<tr>
<td>Religious/Spiritual</td>
<td>Service</td>
<td>Sport Club</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#5. Provide the Purpose/Brief Description of Your Organization
   This description will be displayed on your organization’s profile and will provide helpful information to students interested in your group. Please remember this should be a brief description/overview of your organization.

#6. Provide Keywords
   Keywords are used when searching for organizations. The more keywords you use the more likely your organization will be found. Separate each keyword by a comma; examples: golf, athletics, intramural sports.

#7. Provide the Student Organization’s Website URL

#8. Upload Organization logo or photo

#9. Optional – Secondary Category (Use the categories listed under #4)

#10. Provide the Student Organization’s Phone Number
    This phone number will be displayed on your profile and will provide a method for students to inquire about the organization.

#11. Provide the Student Organization’s Email Address
    This e-mail address will be displayed on your profile and will provide an additional method for students to inquire about the organization. Please list an email address that is regularly checked (e.g. the president’s email).

#12. Provide the Student Organization’s Social Networking sites (e.g. Facebook, Twitter, etc.)

#13. Provide the Student Organization’s Mailing Address

#14. Provide the Officers’ and Advisor(s)’ Information. Three different UNC Charlotte students must hold the offices of President, Treasurer, Vice President or Secretary. The President’s name will be displayed on the Student Organizations Directory as a contact person for the student organization. *Only @uncc.edu e-mail addresses will be accepted for officers.

#15. Provide Member Information
    All registrations must include the names, phone numbers, and email addresses for eight (8) student members of the organization.

#16. Membership Roster

#17. Provide answers to questions about Membership Criteria and Meetings.

#18. What month does your organization transition its new officers?

#20. University Hazing Policy Agreement
    Your student organization needs to review and agree to abide by the University of North Carolina at Charlotte Hazing Policy.

#21. Constitution
    Attach a current copy of your student organization’s constitution/bylaws.
BENEFITS & RESPONSIBILITIES

The following benefits and responsibilities are excerpts from the Act for Registration under the purview of the Student Government Association. The complete Act for Registration document is available at sga.uncc.edu.

Responsibilities

• Register annually with the Student Government Association. Registration begins on the first business day of April and concludes on the second Friday of September by 5:00pm. (Review the Annual Registration Checklist on pg. 40 for additional information regarding this process.)

• Maintain at all times at least eight (8) current student members 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 three (3) officers including a President and Treasurer as well as either a Secretary or Vice President.

• 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 UNC Charlotte or SGA contractually. The use of the University’s tax exempt status is not included in this benefit.*

• Grant funding available by SGA via the Organizational Ways and Means Committee. Funds include event, travel, publication, and operational opportunities.

• Lockers may be applied for within the Student Organization Resource Center (SORC).

• The Student Organization Resource Center (SORC) has a host of resources available to organizations including computers, meeting spaces, supplies, and more. The SORC is located inside the Student Government and Organizations Complex on the second floor of the Popp Martin Student Union.

• Assistance from Student Involvement staff including leadership training, educational workshops, general organization advising, event planning, publicity, and reference materials.

• Listings in organization directories on Niner Engage.

• Participation options in University events such as International Festival, Homecoming, Student Organization Showcases, Union Take Overs, and Niner Nights (as availability permits).
ORGANIZATION ADVISORS

It is recommended but not required that all student organizations have a UNC Charlotte 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 Student Involvement staff member.

AFFILIATE ADVISORS

In addition to an on-campus faculty/staff advisor, groups may choose to have up to two “Affiliate Advisors.” Affiliate advisors usually come from the local community and are seen as an added resource for an organization. All the information and responsibilities related to faculty/staff advisors apply to affiliate advisors. If your organization would like to request an exception for the two (2) maximum policy, contact the Program Coordinator for Student Organizations.

For more information about affiliate advisors, visit studentorgs.uncc.edu/advisor.

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 Student Involvement 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 UNC Charlotte Office of Legal Affairs, UNC Charlotte website, SAFC Business Manual, and the Student Organization Handbook are great sources for University rules and regulations. The staff members in the Student Involvement office 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 RESOURCE CENTER (SORC)

The Student Organization Resource Center (SORC) is an area in the Student Government and Organizations Complex (SGOC) that is dedicated to student organization leaders and members for handling the day-to-day operations of your group. The resource center is designed to give you access to MAC computers with the latest design software, button machines, and a laminator. In addition, you will have access to the SGOC printer/scanner/fax. Printing is free if your organization uses an Operational Funds grant. Art supplies are provided free to organizations. The SORC also includes a microwave, refrigerator, and sink. For more information, please visit studentorgs.uncc.edu/sorc.

Information you should know about the SORC:
• 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 SORC so that they are available to everyone at all times!
• Materials in the SORC are for student organization use only - materials are not for personal use or class projects.

STUDENT ORGANIZATION STORAGE UNITS

Storage is available for student organizations in the Student Government and Organizations Complex (SGOC), and throughout the Popp Martin Student Union.

Storage space is reserved for a period of one academic year. Organizations must reapply at the end of the Spring semester in order to be considered for a storage unit for the following academic year. For more information please visit studentorgs.uncc.edu/storage.

EQUIPMENT & PROGRAM SUPPLY CHECK-OUT

Games, sport equipment, tents, decorations, walkie talkies, gaming systems, and more are available for check-out to student organizations. These items are to be used as a supplement to programs and events occurring on-campus.
For more information about this program and a list of available items, please visit safc.uncc.edu/program-resource-supply-checkout-program.
STUDENT ORGANIZATIONS SHOWCASE

The Student Organizations Showcase takes place twice during the academic year. The first is in August during the Week of Welcome (WOW), and the second occurs in January at the beginning of the spring semester. These Showcases are open to the entire campus community and provide an opportunity for the student body to connect with registered student organizations at UNC Charlotte. Student organization members staff tables where they can recruit new members and distribute information about their organization. Please see a Student Involvement staff member for more information or visit studentorgs.uncc.edu/showcase.

WORKSHOPS

Workshops are presented throughout the year to help strengthen student organizations. The workshops are for any student leader, member, or advisor involved with a registered student organization. A current schedule of workshops is available at studentorgs.uncc.edu/workshops.

All student organizations must send at least one member of their new executive board to an Annual Registration Workshop. This workshop will cover topics such as funding, available resources and benefits, and policies.

NINER NIGHTS PROGRAM

The Niner Nights program takes place the first night of each summer SOAR session. This is an opportunity for organizations to inform students about their group and also the benefits of becoming involved at UNC Charlotte.

NEW STUDENT ORGANIZATION CHECKLIST

STEP #1. Read the Act for Registration to understand what rights and responsibilities student organizations have at UNC Charlotte.

STEP #2. Have at least eight (8) UNC Charlotte students who are interested in participating in the organization. Record these students’ names, phone numbers, and email addresses, which will need to be included on the online registration form.

STEP #3. Search for a UNC Charlotte faculty or staff member who is willing to serve as an advisor to your organization. An advisor is not required, but recommended.

STEP #4. Write a constitution for the organization; include by-laws if necessary. To download the online template, visit studentorgs.uncc.edu/neworganization.

STEP #5. Select officers for the organization. Each organization must have at least three (3) student officers who are in good standing with the University and enrolled as full-time students. Your organization must list a President, Treasurer, and a Vice President or Secretary.

STEP #6. Register a new organization in Niner Engage.

STEP #7. Schedule an appointment to meet with the Associate Director for Student Activities for Student Involvement.

STEP #8. The student organization will be invited to appear before the SGA Organizational Ways & Means Committee. At this meeting, members will share the purpose of their new organization. The Organizational Ways & Means Committee will submit the organization’s request for approval to the SGA Senate. The Senate will vote on whether to officially recognize the group.
STUDENT ORGANIZATIONS EXCELLENCE AWARDS

Every year the Student Involvement office sponsors the Student Organizations Excellence Awards. This program is dedicated to recognizing the outstanding accomplishments of student organizations, student leaders, and faculty/staff advisors. The awards and banquet provide an opportunity to celebrate a successful year. Look for information, including nomination packets, during the spring semester at studentorgs.uncc.edu/awards. The Student Organization Excellence Awards categories are:

**Outstanding Student Organization**
Recognizes the student organization that demonstrated consistent flexibility, initiative, creativity, and perseverance. Made a meaningful contribution to students, the University, and/or the surrounding community.

**Outstanding Graduate Student Organization**
Recognizes the graduate student organization that demonstrated consistent flexibility, initiative, creativity, and perseverance. Made a meaningful contribution to students, the University, and/or the surrounding community.

**Outstanding New Student Organization**
Recognizes a newly registered student organization that exhibited initiative in organizational development and strong potential to contribute to the quality of life as a recognized student organization at UNC Charlotte.

**Outstanding Student Organization Program**
Recognizes a student organization program that enhanced the University community.

**Outstanding Teamwork/Collaboration by a Student Organization**
Recognizes the student organization that worked most effectively with other student organizations, University departments, and/or the greater Charlotte community.

**Outstanding Contribution to the Greater Community by a Student Organization**
Recognizes a student organization that made a meaningful contribution to the surrounding community through service.

**Outstanding Student Organization Online Presence**
Recognizes a student organization with the most impressive on-line presence, a combination of a webpage and uses of social media.

**Outstanding Student Organization Leader**
Recognizes a student leader that provided exemplary service, commitment, and strong leadership to a student organization and UNC Charlotte.

**Student Leadership Legacy**
Recognizes a student leader whose long-term dedication and commitment have made a positive impact on sustaining the visibility of a student organization.

**Quiet Influence / Unsung Hero**
Recognizes a student that put his/her heart and soul into everything he/she did, but often went unrecognized, worked “behind the scenes,” and went above and beyond typical requirements of a general (non-officer) student organization member.

**49er Pride**
Recognizes a student organization that provided leadership, 49er spirit and campus participation in university events.

**Outstanding New Advisor**
Recognizes an advisor in his/her first or second year advising a student group who provided outstanding support for the organization.

**Outstanding Advisor Lifetime Achievement**
Recognizes an advisor who has at least three years experience as a student organization advisor at UNC Charlotte, and has had a positive impact on a student organization and the University community.
STUDENT ACTIVITY FEE FUNDING 
ELIGIBILITY AND SOURCES

All organizations applying for funds through the Student Government Association (SGA) or the Graduate and Professional Student Government (GPSG) must be registered with the Student Involvement Office and approved by SGA. Accessibility to funding is dependent on registration status of the organization. Student organizations can register at the following website: studentorgs.uncc.edu/registration.

Graduate student organizations receive funding from the Graduate and Professional Student Government (GPSG), and must be chartered with GPSG in order to receive any funding. See “Types of GPSG Grants and Funding” section for more information.

Sport Clubs receive funding from Recreational Services. Visit recservices.uncc.edu/sport for more information.

TYPES OF SGA GRANTS AND FUNDING

There are six types of funding opportunities for student organizations eligible to participate in the SGA grant and funding processes. (*Does not apply to graduate groups or sports clubs.)

Operational Funding
Student organizations can apply for operational funds to assist with the necessary day-to-day operational needs of the group and its recruitment of new members. Groups may request operational funds beginning 10 business days before the first day of classes during the Fall and Spring Semesters, and ending 10 business days prior to the last day of classes each semester. Funds are requested by consulting the Student Involvement Financial Associate.

On-Campus and Off-Campus Event Grants
Student organizations can apply for these grants to support the programming needs of registered student organizations on-campus and within the greater Charlotte area. There is a maximum on the amount allocated for each grant. Please refer to the Financial Procedures Act for more information. There is no limit to the number of on- or off-campus events/programs the group may organize for the campus community.

Co-Sponsored Event Grant
Student organizations can apply for this grant to support the programming needs of two or more student organizations wishing to co-sponsor events together. There is a maximum for each co-sponsored event grant. Please refer to the Financial Procedures Act for more information.

Travel Grant
Student organizations can apply for this grant to travel to conferences and competitions not organized by the student organization. There is a maximum for each travel grant. Please refer to the Financial Procedures Act for more information.

Publication Grant
Student organizations registered in the media classification, and whose primary mission is printing or other types of publishing, can apply for this grant.

Funds must be requested and approved according to the timeline approved by the SGA Organizational Ways and Means Committee.

To access applications or to download specific SGA Funding Policies and Procedures, guidelines, and timelines, please go to studentorgs.uncc.edu/funding.
TYPES OF GPSG GRANTS AND FUNDING

Graduate student organizations can seek funding only from the Graduate and Professional Student Government (GPSG) and only if they have obtained the status of a chartered graduate organization in addition to their registration with Student Involvement. There are three (3) types of funding available to graduate student organizations: Operational Funds, Event Funding, and Travel Funding.

Operational Funds
Operational Funds are available by request during the academic year to graduate organizations that have both registered with the Student Involvement Office and chartered with GPSG for the purposes of group recruitment, fundraising, and other day-to-day operations. All unused funds revert to GPSG on March 1.

Event Funds
Event Funding is a special grant made for a specific event to be held by the organization. Requests must be made three weeks before the event date and follow the process outlined on the GPSG website.

Travel Funds
Travel Funding is a special grant given to individual graduate students for the purpose of attending or presenting original research at professional conferences. Travel Funding becomes available three times during the academic year.

More information on applying for these funding opportunities can be found by going to gpsg.uncc.edu and clicking on “Travel Funding or Org Funding.”

STUDENT ACTIVITY FEE USAGE

All monies awarded through SGA and GPSG are considered student activity fee funds and must be receipted and expended according to UNC Charlotte Purchasing and Accounting Procedures, SGA/GPSG policies, and SAFC guidelines and statutes. The most common ways to use your student activity fee money include:

- Off-campus purchases using your personal or off-campus club funds for reimbursement with original, itemized receipt.
- Purchases from on-campus vendors such as the Bookstore using appropriate forms.
- Vendor payments with proper justification for expenditure.
- Travel expenses (reimbursements after the trip).
- Payment to guest speakers or entertainment using the contract process.

All usage of student activity fee funds should begin and end with either the Student Involvement Financial Associate (undergraduate groups) or the SAFC Business Manager (graduate groups).

In addition to SGA and GPSG Funding Guidelines, the complete set of SAFC guidelines that applies to all groups are available online at safc.uncc.edu. For questions, please contact the SAFC Business Manager at (704) 687-7255.
TRAVEL PROCEDURES

1. Contact the Student Involvement Financial Associate or SAFC Business Manager to make arrangements at least three weeks before travel date.

2. No cash travel advances will be issued to individuals representing clubs/organizations. Any requests for an exception to the “no travel advance” policy can be brought to the monthly SAFC meeting after channeling through the proper administrative bodies of Student Government Association, Campus Activities Board, Graduate Professional Student Government or Student Media Board. In the event that a travel advance is granted to a club or organization, the advance must be made payable to the faculty/staff advisor of that organization.

3. When awarded a travel grant, student organizations must pay for all travel pre-payments and expenses and are then reimbursed after the travel. Please do not allow your department to pay for any SGA or GPSG approved expenses. The department will not be reimbursed.

4. Once students return, all original receipts must be turned in to the Student Involvement Financial Associate or SAFC Business Manager within two weeks.

5. All reimbursements will be made to individual student accounts. No reimbursements will be made to student organization accounts or advisors, or transferred to departments that pay for any expenses.

6. All travel will require proof of attendance in order to be reimbursed.

SAFC FINANCIAL GUIDELINES SUMMARY

• All expenditures begin and end with the Student Involvement Financial Associate or SAFC Business Manager.
• All expenditures require the signature of an authorized organization/committee representative and the divisional representative before being presented to the SAFC Business Manager for processing.
• Your organization is not allowed to spend more than it is allocated by SGA or GPSG as directed by SAFC.
• It is the traveler’s responsibility to settle travel reimbursements with the Student Involvement Financial Associate or SAFC Business Manager within 10 days after return date.
• Funds cannot be expended from your account until all authorized representatives from your organization complete an Acknowledgement and Signature Authorization Form that will be filed in the office of the SAFC Business Manager for verification of signatures.
• Personal items (including alcohol, tobacco, and drugs) cannot be purchased with student fee allocated funds.
• Do not make arrangements with vendors prior to completing the necessary paperwork. Failure to do so may mean you get stuck with the bill!
• Keep the original, itemized receipt for reimbursement. Receipts for reimbursements will only be accepted two weeks from date of purchase. Copies of receipts will not be accepted for reimbursement.
• Reimbursements will be paid to individuals and not student organization accounts. (Student organizations should utilize on-campus resources whenever possible.)
• Make travel arrangements at least three (3) weeks prior to travel date or once travel funding has been approved.
• Lodging will be reimbursed at the current state rate. Mileage will be reimbursed at $.17/mile.
• Air travel purchased by the student may be reimbursed after the trip.
• All reservations for state vehicles must be made by the Student Involvement Financial Associate or SAFC Business Manager. Only state employees (including student employees and graduate assistants) are eligible to reserve and use a state vehicle.
• All monies generated from student fee allocated funds must be deposited to the University Cashiers Office within 24 hours of receipt.
• Any publications, advertisements, or promotional materials for events sponsored by any organization shall display a tag line stating that the program, event, or service is Funded by your Student Activity Fees.
• Food cannot be purchased with student activity funds to be consumed during a general business meeting of your organization.
• Plan ahead! Please consult SGA or GPSG for established timelines and requirements for purchases and travel.
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:

- Create a proposal during the early 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 specific responsibilities each organization will carry out for the 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.

Student organizations should be aware of, and are forbidden to participate in, “fronting” as defined on pg. 24 of this handbook.

MOVIE THEATER PROGRAMMING GRANT

The Popp Martin Student Union has created a Movie Theater Programming Grant for registered student organizations to be used Monday - Wednesday. The funding would pay for the acquisition of a movie license, worth roughly $300 to $800. Student organizations can submit a movie grant application to the Movie Theater Committee. All movie grants will be reviewed by the Movie Theater Committee and scored based on an evaluation form.

Prior to submitting the Movie Theater Programming Grant application, the registered student organization must reserve the theater through the CRES Office.

The Movie Theater Programming Grant is intended to provide an outlet for diverse, engaging, and culturally rich movie based events. More information can be found at studentunion.uncc.edu/theater-grant.

FUNDRAISING

 Funds which are generated by student organizations, not using student activity fees, can be placed in off-campus accounts or can be set up as an agency account. If these revenues were generated from student fee funds, they must be deposited into your on-campus student activity fee account and cannot be spent on the purchase of alcohol, drugs, or other illegal activities, nor can they be used for personal gain. Always be aware that your organization is using the UNC Charlotte name, and funds should be managed appropriately. Monies generated must be in compliance with all federal, state, UNC Charlotte, and SAFC laws, regulations, and guidelines.

Groups can use campus facilities to host fundraisers. Reservations can be made through the Conference, Reservations, and Event Services (CRES) Office. In the event your organization is hosting a fundraiser that requires ticket sales, please consult the Conference, Reservations, and Event Services (CRES) staff.

Please also be aware that if your student organization receives student activity fee funds to host an event/program, and your student organization decides to charge an admission fee in order for students to gain entry to the event/program, any revenue generated must be returned. This money will be used to supplement future events/programs sponsored by UNC Charlotte student organizations. The intent is that all events/programs that use student activity fees are FREE to UNC Charlotte students!
DONATIONS

Fundraising by soliciting donations, whether cash or merchandise, can be 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 donations requested by a student organization must be requested and accepted on behalf of the student organization (NOT UNC Charlotte). The request should be on the student organization's letterhead.

Gifts designated for a student organization are received by the Office of University Advancement made payable to The Foundation of the University of North Carolina at Charlotte, Inc., with the designation to the specific student organization documented in writing. No gifts received through the Foundation will be given directly to the student organization or deposited into a student organization’s agency fund or outside bank account. Donated funds will be deposited into an on-campus Foundation Trust Fund account that the group can access, and can carry over each year. Please contact the SAFC Business Manager to get access to the account once you have received a donation.

The Office of University Advancement takes a 5% processing fee which offsets Foundation staff support that allows the donation to be tax deductible for the giver and also supports the giver’s employer Matching Gift Program (not all employers do matching gifts but many private corporations do).

For questions, please see a Student Involvement staff member in the Student Government and Organizations Complex, Student Union room 212.

RAFFLES AND POOLS

A “raffle” means a game in which the prize is won by random drawing of the name or number of one or more persons who has purchased chances. The maximum cash prize that may be offered or paid for any one raffle is $125,000 and if merchandise is used as a prize the value of the item cannot exceed $125,000 in value. Real property may be offered as a prize in a raffle. The maximum appraised value of real property that may be offered for any one raffle is five hundred thousand dollars ($500,000). The total appraised value of all real estate prizes offered by any nonprofit organization or association may not exceed five hundred thousand dollars ($500,000) in any calendar year. Subject to these rules, groups may also offer a “half-and-half” raffle, where the earnings are split between the winner and the organization. Groups planning raffles must complete the proper application at the Conference, Reservations, and Event Services Office. A federal or state issued tax exempt number is required. A non-profit organization may not conduct more than two raffles per year. For more information, see Section III.H of University Policy 101.18, Gifts, Awards, and Prizes.

Raffles shall not be conducted in conjunction with BINGO games.

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. “Net proceeds of a raffle” means the receipts less the cost of prizes awarded (the amount left over after the prize is awarded). Therefore, if the raffle brings in $1,000, and you give away $500 as the prize, then the 90% rule applies to the remaining $500 (e.g., no less than 90% of $500 ($450) shall be used for charitable, religious, educational, civic, or other non-profit purposes). 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.

These rules are set forth in North Carolina General Statute Section 14-309.15. As set forth in this statute, “Any person who conducts a raffle in violation of any provision of this section shall be guilty of a Class 2 misdemeanor.” The raffle winner’s prize, whether cash or merchandise, is subject to federal income tax.

“Pools” or “brackets” fall under the definition of “gambling” as set forth in North Carolina General Statute 14-292: “any person or organization that operates any game of chance or any person who plays at or bets on any game of chance at which any money, property or other thing of value is bet, whether the same be in stake or not, shall be guilty of a Class 2 misdemeanor.” Gambling will also subject a student organization to discipline under the Code of Student Responsibility. It is advised that student organizations not engage in pools or brackets.
OFF-CAMPUS CHECKING 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 other than 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.

Student organizations may establish off-campus checking accounts and/or on-campus agency accounts. While off-campus accounts are more flexible because funds can be available immediately, and debit cards may be available, they include no oversight by UNC Charlotte staff. On-campus agency accounts are often advantageous because they require UNC Charlotte staff approval of expenditures and monitoring of accounts to prevent misuse of funds, though funds are not available immediately upon request.

If your organization wants to establish an off-campus checking account, you will need to receive a tax identification number (now known as an Employer Identification Number or EIN) from the Internal Revenue Service (IRS). You can contact the IRS at the following number, (800) 829-4933 or visit their website, irs.gov, and search for form SS-4, or go to irs.gov/uac/Form-SS-4,-Application-for-Employer-Identification-Number-(EIN), and apply for the EIN online. Please make sure that you are requesting an EIN and not a tax exempt number; there is a fee associated with a tax exempt number, whereas an EIN is free. In order to establish an off-campus checking account or receive donations, businesses/banks require you to have an EIN. A student organization's off-campus bank account may not use or be associated with the UNC Charlotte tax ID number or any form of the UNC Charlotte name or logo.

Please note, the Student Involvement Office and SAFC Business Manager do not maintain information about off-campus checking accounts. All details and account information must be maintained within the student organization. UNC Charlotte staff have no responsibility for oversight or management of such accounts, and there is no recourse available to a student organization against the University for any mismanagement or misuse of funds in off-campus checking accounts. Theft of funds (including misuse or mismanagement) from an off-campus checking account by a member of a student organization, however, may subject that student or the organization to discipline under the Code of Student Responsibility.

If your organization wants to establish an on-campus agency account, one of your organization’s officers should meet with the SAFC Business Manager, located in the Student Government and Organizations Complex (SGOC), to create a new Banner Fund Form.

AGENCY ACCOUNTS

Student organizations may choose to establish on-campus agency accounts. While off-campus accounts are more flexible because funds can be available immediately, and debit cards may be used, they include no oversight by UNC Charlotte. On-campus agency accounts are often beneficial because they require UNC Charlotte staff approval of expenditures and monitoring of accounts to prevent misuse of funds. An agency account does not require a tax identification number from the IRS.

All accounts must maintain a minimum balance, and cash advances are not available. Please visit studentorgs.uncc.edu-agency-accounts for minimum balance information. The funds in these accounts typically originate from membership dues or monies received through fundraising and carry over each year with the student organization.

If your organization is interested in establishing an on-campus agency account, please visit studentorgs.uncc.edu-agency-accounts for more detailed information. After reviewing the information, contact the SAFC Business Manager located in the Student Government and Organizations Complex, Room 212, or call (704) 687-7255 to establish an agency account.
UNIVERSITY FACILITIES AND RATES

The Conference, Reservations, and Event Services (CRES) Office staff can assist you in determining the best location for your meeting or event. Some facilities can better serve the needs of certain types of meetings and special programs. To determine availability, contact the Reservations Office at (704) 687-7872 or visit the website at cres.uncc.edu as early as possible prior to your meeting or event. All meeting space is free for student organizations to use for organizational meetings and events. Labor rates may apply outside of normal operational hours and/or for technical or event personnel. If payment will be made using your organization’s student activity fee account, you must obtain pre-authorization from the Student Involvement Financial Associate.

Student organizations should be aware of, and are forbidden to, “front.” “Fronting” is the practice of permitting an individual or organization not affiliated with UNC Charlotte to use University space/facilities and services under the guise that the activity is a University-sponsored event. Non-affiliated individuals and organizations are not eligible for University departmental or student organization rates or scheduling privileges unless they are sponsored by an affiliated group in accordance with Policy Statement 601.6, Scheduling University Facilities, and CRES’s instructions and guidelines.

- Departments and organizations that are determined to be fronting will be charged the maximum applicable rate and/or be subject to the loss of reservation privileges.
- CRES staff will determine if groups are fronting another organization by considering the nature of the event, previous knowledge of the event, and the nature of attendees.

RESERVATION POLICIES

Reserving space on campus is one of the benefits afforded to registered student organizations. All registered student organizations in good standing with the University are allowed to participate in the spring reservation process to reserve space for recurring reservations and special events for the following academic year.

The following are terms used when making reservations:

- **Advanced Reservation Process** – a process whereby requests for reservations may be made for the following academic year. After the conclusion of the process, reservations may be made on a first-come first-served, space available basis.
- **Ad-Hoc Reservation** – individual one-time reservations
- **Recurring Reservations** – any regularly scheduled meeting throughout the academic term or academic year, i.e. every Thursday at 6:00 pm.
- **Special Event** – any event that is outside of the group’s normal business or regular meeting, including social and educational programs

**Advanced Reservation Guidelines**

Groups that attend informational workshops specifically for the Advanced Reservation Process that takes place each spring will be allowed to make reservations for the following academic year. Those groups that do not wish to attend the workshop may make reservations anytime after the formal advance process has been completed.

The following advanced reservation guidelines exist for all recognized student groups:

- No more than one (1) recurring reservation per week may be made by any one organization during the advanced reservation process.
- Weekly meetings will be no more than two (2) hours in length. Exceptions will be considered with final decision(s) from the director of the requested building, based on special need circumstances.
- Groups with outstanding charges more than two (2) weeks past due will not be permitted to participate in the advanced reservation process until all charges are paid.
- After completion of the advanced reservation process there will be at least a one (1) day period for registered student groups to make additional ad-hoc reservations prior to other UNC Charlotte affiliated groups.
- Use of additional amplified sound during recurring meetings is prohibited, regardless of space/building in which the meeting takes place.
- Exact dates for the beginning of the advanced reservations process will be sent to each registered student organization and campus departments by the Conference, Reservations, and Event Services (CRES) Office.
RESERVATION POLICIES

Ad-Hoc Reservation Guidelines
After the formal process is complete, single ad-hoc reservations are open on a first come, first-served basis.

Recurring Reservation Guidelines
The following is a list of spaces NOT available for recurring reservations:
• In the Cone University Center
  • C.A. McKnight Lecture Hall
  • John Paul Lucas Room
  • After Hours
  • Room 207
  • All lounges
• In the Popp Martin Student Union
  • Rooms 222 and 269
  • Norm’s
  • Popp Martin Student Union Movie Theater
  • Multipurpose Rooms G, H, and I
  *Multipurpose Room sections A, B, C, D, E, and F may be available for recurring reservations between Sunday at 4:00 p.m. through Thursday at midnight. Student groups may reserve no more than two (2) sections of the Multipurpose Room for these meetings.
• In the Barnhardt Student Activity Center (SAC)
  • No space is available for recurring reservations

Special Event Guidelines
The following special event reservation guidelines exist for all recognized student groups:
1. Each group may reserve the JP Lucas Room and/or the CA McKnight Hall up to two (2) times each semester for special or social events during the advanced reservation process.
   • After the conclusion of the formal advanced reservation process the Lucas Room and McKnight Hall may be reserved for meetings one month in advance, if the space is available, no more than one (1) time per week.
   • Reservations will be accepted no sooner than the last week of the month for the following calendar month.
2. During the advanced reservation process groups may schedule/add any of the nine sections of the Popp Martin Student Union Multipurpose Room (MPR) beginning Friday and continuing through 4:00 p.m. on Sunday. Requests for special events to be held in larger portions of the room during the week will be reviewed by the Conference, Reservations and Event Services (CRES) staff on an individual basis, as per availability.
3. Requests for special events in Norm’s, the Popp Martin Student Union Movie Theater and other areas of the Popp Martin Student Union will be reviewed by CRES on a case-by-case basis.
4. Requests for special events in the Barnhardt Student Activity Center (SAC) will not be confirmed until the athletic schedule has been confirmed.
5. Requests for additional special events in the Popp Martin Student Union may be made at the conclusion of the advanced reservation process based on availability.

For complete reservations policies, please visit cres.uncc.edu.
RESERVATION CHANGES, CANCELLATIONS AND NO SHOWS

Simple changes made to reservations should be made at least two (2) working days in advance. This includes any changes to set-up and attendance. Ten (10) working days are required for changes made to more complex reservations that include any change in or additions to: sound systems, microphones, video projection units, or building manager assistance. Facilities authorized for use by an organization may not be transferred, assigned, or loaned to another organization without prior approval from the Conference, Reservations, and Event Services (CRES) Office. Failure to give proper notice of changes may result in the inability to accommodate your requests.

Any cancellation of events must be made at least two (2) working days in advance. Failure to give proper notice of cancellation will be considered a no show. If you have a space reserved in the Cone University Center, Student Union or Student Activity Center and do not use the space, your group will be charged with a no show. Two (2) or more no shows within the same academic year will be grounds for the organization to forfeit the use of the space for the current semester and /or ability to schedule space for the next semester (this includes student organization recurring reservations). After a second no show, groups will receive a letter indicating the remainder of the group’s reservations have been cancelled and will have to reserve space on a week to week basis. If you are late for a reservation and leave early you should notify the CRES Office or check with the building manager on duty so the group will not be considered a no show. If a technician has been scheduled or the building has been opened early for an event that was not cancelled, the group will be charged accordingly. Charges may also apply to groups who cancel after the two-day period.

HOSTING EVENTS THAT INCLUDE ALCOHOL

State law prohibits the sale of any alcoholic beverage on the University of North Carolina at Charlotte campus, with limited exceptions. A “sale” includes practices such as charging admission to events where alcohol is served, requiring the purchase of tickets, or requiring donations or other exchanges in order to receive alcoholic beverages. University Policy 706, Alcoholic Beverages, governs the possession and consumption of alcoholic beverages on campus.

State funds and student fees collected by the University cannot be used to purchase alcoholic beverages.

Common Source Containers are prohibited within any Campus residence building and in all Campus outdoor areas. Common Source Containers are prohibited at events sponsored by student organizations.

BYO Events

1. The only events at which student organizations may have alcoholic beverages are approved “Bring Your Own” (BYO) events.
2. Prior to reserving space for a BYO event, a student group is required to have at least one of its current executive officers complete an Alcohol Education Workshop, which is presented by the University. Faculty and staff advisors to student groups are encouraged to attend these sessions as well.
3. Additional requirements for BYO events are listed in University Policy 706, Alcoholic Beverages, at legal.uncc.edu/policies/up-706.
NOISE/AMPLIFIED SOUND

In order to ensure that students, faculty, and staff do have the opportunity to exercise their primary rights, the following guidelines have been established:

1. There is to be no loud and/or amplified sound outside with the exception of the following times: Friday: 5:00 pm to 11:00 pm, Saturday: 8:00 am to 11:00 pm, Sunday: 8:00 am to 11:00 pm. *This restriction applies to both formal and informal events or activities.
2. Supplemental, loud or amplified sound is not permitted at student organizations’ weekly meetings in any space on campus. Use of the house sound will be allowed. This would include rooms with smart podiums that have speakers built into the ceiling or the podium. Acoustic acts will be permitted as well. Supplemental equipment such as amplifiers, additional speakers, drum kits, etc. are NOT allowed. *Special events, with approval from the CRES office, will still be allowed depending on the activities to ensure there are no conflicts with other meetings or events.
3. When making reservations, student organizations should check if a facility has a separate policy regarding amplified sound.
4. Amplified sound must be in compliance with the City of Charlotte Noise Ordinance (charmeck.org/city/charlotte/CMPD/resources/Ordinances/Pages/Noise%20Ordinances.aspx) as well as any other applicable policies and/or guidelines which have been established for outside functions.
5. Requests for exceptions must be submitted to the Conference, Reservations, and Event Services (CRES) Office at least ten (10) working days prior to the requested activity.
6. When enforcing this policy, consideration will be given to the intended use or purpose of the reservable space. Conflicts in use will be resolved based on primary purpose.
   • Classroom Buildings – Primary purpose is academic. Secondary use may not interfere with academic endeavor.
   • Non-Classroom Buildings – Primary purpose is administrative. Secondary use may not interfere with administrative endeavor.
   • Public Space – Primary purpose is public movement and assembly. Secondary use should avoid conflict with any proximate academic and/or administrative purpose.
   • Student Use or Activity Buildings – Primary purpose is student activity and engagement. Full consideration should be given to venue-specific usage compatible with existing conditions adjacent to the facility in use.
7. Activities, programs or events must not unreasonably disrupt official University functions or the orderly operation of the campus. Groups must be respectful of other facility users. If asked to lower the sound level by a designated University representative the group must comply in a timely manner. Failure to do so may result in the cancellation of the remainder of the reservation and closure of the event. Continuing or repeated violations of the noise policy may result in a cancellation of reservations for the balance of the semester. While the Conference, Reservations, and Event Services Office will make every effort to place groups in space that is suitable for their event type it will be the responsibility of the reserving group to maintain an appropriate level of volume.
8. Student Union Rotunda events with amplified sound during normal business hours (Monday-Friday, 7:00 AM-5:00 PM) will be limited to two (2) total hours of actual sound (including a sound check). Drum kits are not allowed in the Rotunda. Rotunda events must not exceed sound levels of 100 db at any time. Student Union staff reserves the right to request a reduction in sound level should it exceed 100 db or is disrupting normal function of the building.

In summary, any type of disruption which interferes with the primary rights of students, faculty, and staff is not allowed. This includes noise that occurs outside or inside campus buildings, whether it be an formal or informal activity.

HOSTING EVENTS WITH FOOD

All commercially prepared food must be prepared by UNC Charlotte’s campus food services contractor, Chartwells College and University Dining Services. Special low cost menus may be available to student groups. Arrangements for such meals should be made directly with Chartwells.

Food service orders to be paid by an organization’s student activity fee account must have authorization from the Student Involvement Financial Associate before arrangements are made with Chartwells. All orders for food service will be sent to the Student Involvement Financial Associate for approval, which will not be granted without obtaining authorization and completing a Food, Beverage, and Amenity Expense Documentation Form and the Catering Authorization Form. Prepackaged items do not have to be purchased from Chartwells; however, student organizations must consult with the Student Involvement Financial Associate before making purchases for said items.

Student Organizations can also earn catering or gift-in-kind credits by working at a Chartwells’ catered campus event. For more information, contact the Catering office at (704) 687-0690.
The Office of Disability Services works to ensure that students with disabilities have access to education and campus life at UNC Charlotte. To ensure full participation and access to the benefits of participating, student organizations need to be accessible to all members, participants, and guests. Learn more by visiting the Campus Accessibility website: accessibility.uncc.edu. An Accessibility Checklist is available to guide you as you plan events at studentorgs.uncc.edu/resources.

The Accessibility Checklist is also important for advisors and organization officers to help you to be mindful of accessibility for people with disabilities when planning the location of meetings, providing materials, and scheduling events. For more information, visit the Campus Accessibility website and check out Events, Activities & Alerts: accessibility.uncc.edu.

The Office of Disability Services works with student organizations, advisors, and officers to ensure program accessibility. Presentations on disability awareness are offered through the Disability Services Student Advisory Board. For more information on scheduling a presentation, contact Katie Montie, ADA Project Coordinator in Disability Services at KatieMontie@uncc.edu.

If a group member or participant in a program has a disability and needs accommodations, you can request those services online through the Campus Accessibility website at accessibility.uncc.edu/requesting-services-events or by calling the Office of Disability Services at 704-687-0040.

For more information about the services, accommodations, and presentations available through Disability Services, we invite you to connect with us at Fretwell 230, by calling (704) 687-0040 or emailing disability@uncc.edu.
LOGOS AND TRADEMARKS

UNC Charlotte has registered its names, initials, logos, and trademarks as a means of protecting them from unauthorized use and abuse. Federal Trademark laws protect the use of the University's marks, including on websites or T-shirts. Permission to use UNC Charlotte logos and marks (which includes UNC Charlotte logos, Charlotte 49er logos/marks and Niner Nation) may ONLY be obtained by calling the University's trademark and licensing liaison at (704) 687-7683. If permission is granted, the use of any University-owned mark must be consistent with the limited permission granted, and must conform to the guidelines, graphic standards, and current University licensing contracts. For student organizations wishing to use UNC Charlotte marks as co-branding with their organization, it is important to use the marks correctly, in accordance with the University graphics standard guide which can be found at brand.uncc.edu/standards. Please contact the Marketing Director for graphics assistance (704)687-7335.

If a student organization receives permission to use any of the University’s registered logo, wordmarks, and indicia, and then makes T-shirts or promotional products with those marks, they must use a licensed vendor (Auxiliary Services Licensing and Trademark can provide student organizations with a list of licensed vendors). In addition, student organizations may not sell those T-shirts or promotional products outside of their group membership. Sale of these items on campus, over the Internet, or to the general public is prohibited. Certain exceptions (determined by the University's trademark and licensing liaison) are made for groups promoting specific events. For more information, see aux.uncc.edu/university-marks.

STUDENT ORGANIZATION COMPLIANCE WITH UNIVERSITY POLICY 406, THE CODE OF STUDENT RESPONSIBILITY

University Policy 406, The Code of Student Responsibility - Chapter 4, Section II. Student Organizations

1. Student Organizations may be Accused of a Violation of the Code without regard to whether members of such Organizations are individually Accused of a Violation arising from the same incident(s).

2. A Student Organization and its officers, leaders, or any identifiable spokespersons may be held collectively or individually responsible when prohibited conduct by those associated with the Organization have received the tacit or overt consent or encouragement of the Organization or of the Organization's leaders, officers, or spokespersons.

3. The officers, leaders, or any identifiable spokespersons for a Student Organization may be directed by the Vice Chancellor for Student Affairs, Dean of Students Office staff, Office of Student Conduct staff, Fraternity and Sorority Life staff, Student Activities staff, Title IX Office staff, or Police and Public Safety officers or other designated security or law enforcement agents to take appropriate action designed to prevent or end prohibited conduct by the Organization or by any persons associated with the Organization who can reasonably be said to be acting on the Organization's behalf. Failure to make reasonable efforts to comply with the directive shall be considered a violation of Chapter 5, Paragraph (m) of the Code both by the individual officers, leaders, or spokespersons for the Organization and by the Organization itself.

4. Organizations may be held accountable collectively if any of the following situations regarding an alleged violation(s) of the Code apply: (a) it was committed by one or more members of the Organization; (b) it was committed by one or more members of the Organization and Organization funds were used to finance the function; (c) it occurred as a result of an Organization-sponsored function.

5. In a Hearing in which an Organization is the Respondent, the president or equivalent officer of the Organization shall represent the Organization unless he/she or she petitions the Director of Student Conduct or designee to substitute another Student representative to represent the Organization.

For additional information, contact the Office of Student Conduct at 704-687-0336 or studentconduct@uncc.edu

A complete copy of University Policy 406, the Code of Student Responsibility can be found at legal.uncc.edu/policies/up-406.

In addition, University Policy 407, the Code of Academic Integrity can be found at legal.uncc.edu/policies/up-407.
UNIVERSITY POLICY 405, HAZING

It is the responsibility of all Students, staff, faculty and members of the University community to ensure an atmosphere of learning, social responsibility, and respect for human dignity. This is achieved by providing positive influences and constructive development for current and aspiring members or participants of any group or organization at UNC Charlotte. Hazing is counterproductive to the positive learning environment the University seeks to create.

1. Policy

Any Student or Student Organization, as those terms are defined in University Policy 406, The Code of Student Responsibility, is prohibited from Hazing. Hazing is a violation of North Carolina state law, this Policy, and The Code of Student Responsibility.

According to North Carolina law (NCGS § 14-35):

“It is unlawful for any student in attendance at any university, college or school in this State to engage in hazing, or to aid or abet any other student in the commission of this offense. For the purposes of this section Hazing is defined as follows: ‘to subject another student to physical injury as part of an initiation, or as a prerequisite to membership, into any organized school group including any society, athletic team, fraternity or sorority, or other similar group.’ Any violation of this section shall constitute a Class 2 misdemeanor.”

Hazing at UNC Charlotte is further defined as any activity by a Student or Student Organization, related to membership in a Student Organization, that intentionally or unintentionally endangers the mental, physical, or emotional health of a person, regardless of whether such person has consented to participation in the activity. Any actions that demean, disgrace or embarrass a person may also be considered Hazing. Hazing can occur either on or off campus. While Hazing is typically associated with membership selection and initiation into a group or organization, it is possible for Hazing to occur before, during, after or separate from membership selection and initiation, and regardless of a person’s status or position in the Student Organization.

Students, Student Groups, and Student Organizations found to be in violation of this Policy may face sanctions set forth in Chapter 10 of the Code of Student Responsibility, as well as possible criminal prosecution. Silent participation or acquiescence in the presence of Hazing, as well as failure to report Hazing when a Student has knowledge or suspicion of Hazing, are not neutral acts; they are violations of this Policy and University Policy 406, The Code of Student Responsibility.

Hazing may be divided into three categories: Subtle, Harassment, and Violent:

• Subtle Hazing includes, but is not limited to, behaviors that emphasize a power imbalance between new members/rookies and other members of the group. Because these types of Hazing are often taken-for-granted or accepted as “harmless” or meaningless, Subtle Hazing typically involves activities or attitudes that breach reasonable standards of mutual respect and place new members/rookies on the receiving end of ridicule, embarrassment, and/or humiliation tactics. New members/rookies often feel the need to endure Subtle Hazing to feel like part of the group or team. (Some types of Subtle Hazing may also be considered Harassment Hazing).

• Harassment Hazing includes, but is not limited to, behaviors that cause emotional anguish or physical discomfort in order to feel like part of the group. Harassment Hazing confuses, frustrates, and causes undue stress for new members/rookies. (Some types of Harassment Hazing can also be considered Violent Hazing).

• Violent Hazing includes, but is not limited to, behaviors that have the potential to cause physical, emotional, and/or psychological harm.

Below are some examples of behaviors that the University considers to be acts of Hazing. This is not an exhaustive list and does not represent every action that could be considered Hazing.

• Physical, verbal, or psychological abuse, shock, or discomfort
• Involuntary confinement, excursions, and/or kidnapping
• Deprivation of food, water, shelter and any other basic needs
• Implied, coerced, or forced consumption of alcohol, food, drugs or other substances
• Forced fatigue or sleep deprivation
• Implied, coerced, or forced physical activity or physical activity that is not a part of the group/organization mission
• Exclusion from social contact
• Servitude or morally degrading or humiliating games or activities
• Any activity that interferes with scholastic/academic responsibilities
• Misleading students regarding the membership or participation requirements of a student group or organization
• Wearing or carrying of any obscene or physically burdensome article or the implied, coerced, or forced removal of clothing

Additional University resources on Hazing can be found on the Dean of Students Office Hazing Education and Prevention
website. Additional resources about hazing in general can be found at StopHazing.org.

2. Reporting Acts of Hazing
Any person in the University community, including faculty, staff, or Student, who observes or becomes aware of any form of Hazing, should immediately report the matter to the Office of Student Conduct or Police and Public Safety. Reports may be submitted online at incidentreport.uncc.edu or through the Police and Public Safety anonymous reporting website. Those offices are responsible for taking appropriate action to respond to such a report. More information regarding how to report an incident and additional information on the University conduct process can be found on the Office of Student Conduct website.

3. Hazing Conduct Process
Hazing, the silent participation or acquiescence of Hazing, and the failure to report a Hazing incident constitutes violations of University Policy 406, The Code of Student Responsibility. Any Student or Student Organization suspected of Hazing is subject to Conduct Procedures under the Code of Student Responsibility.

4. Contact
Members of the University community should direct any questions regarding this Policy to Office of Student Conduct at 704-687-0336 or studentconduct@uncc.edu.

The complete, most up-to-date University Hazing Policy is available at http://legal.uncc.edu/policies/up-405

HELP SEEKING PROTOCOL

A priority of the University is students’ health, safety, and welfare. As Noble Niners, students are expected to demonstrate compassion by seeking help in potentially dangerous or life-threatening situations. The University does not want the fear of student conduct repercussions to be a barrier for seeking help. In lieu of Conduct Procedures, the Help Seeking Protocol provides students an opportunity to seek help for themselves or others while being connected to campus and community resources. Additional information about the Help Seeking Protocol, including how it applies to Organizations, can be found at http://helpseeking.uncc.edu.
PUBLICITY AND COMMUNICATION
GETTING THE WORD OUT

Campus Events Online Calendar
(704) 687-7581 • campusevents.uncc.edu
Submit information via the website to appear in the online campus events calendar and UNC Charlotte homepage “Events” tab.

Student Niner Media
Popp Martin Student Union lower level, Student Niner Media • (704) 687-7140 • media.uncc.edu
• The Niner Times - published weekly during the academic year and updated regularly online at ninertimes.com
• Niner News
• Radio Free Charlotte
• Media Marking - advertisements, call for current rates
Submit information in the form of a news release or advertisement. There are charges for advertisements. Contact Student Niner Media for rates or the appropriate reporter.

Office of Public Relations
Foundation Annex • (704) 687-5822 • publicrelations.uncc.edu
• Press Releases for news media/external audiences
• Inside Charlotte • inside.uncc.edu - Faculty/Staff Web Portal
Contact the Office of Public Relations for assistance with news events that are open to the community and/or are of community interest.

Student Organizations Newsletter
The Student Involvement office sends out a weekly electronic newsletter to all student organization officers and advisors. If your student organization would like to advertise an upcoming event, send the event information to studentorgs@uncc.edu.

Niners on the Weekend Newsletter
If you are hosting an event on Friday, Saturday, or Sunday, email ninerweekend@uncc.edu to advertise in the weekly Niners on the Weekend Newsletter which is sent out each Thursday. Be sure to include the name of the event; date, time and location; name of sponsoring organization; brief description of the event (including cost, if applicable); name and email of primary contact person; and website for more information (if applicable).

Posters and Flyers
Various buildings have general information boards, of which some are open and some are reserved. For reserved boards, groups must ask permission from the appropriate person prior to posting. Most boards will list the contact person for that building. For information and policies regarding posting in and around the Popp Martin Student Union, please visit studentunion.uncc.edu/services/marketing/posting.

Banners
Banners can be placed in the residence halls, outdoor towers and scaffolding rigs, Colvard Building, the Popp Martin Student Union, and the Cone University Center. You must submit a reservation request for space and/or ask for permission from each individual area. Please do not use glitter on your banner and do not hang banners over windows or block doorways. For information on hanging banners in the Popp Martin Student Union, please visit studentunion.uncc.edu/services/marketing/banners. Union Station offers graphic design services, wide format printing, and sign making capabilities.

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 Popp Martin Student Union by visiting the Reservations Office. For a table outside the Popp Martin Student Union, see the Information Center for daily availability.
Digital Signage
Student organizations may submit a digital slide of an announcement or event to be posted on the Popp Martin Student Union digital screens. See studentorgs.uncc.edu/resources for posting on the Student Government and Organizations Complex screen. Visit studentunion.uncc.edu/services/marketing for information on other digital signage opportunities in the Student Union. For information regarding digital signage in other campus facilities, contact the administration office specific to that building for guidelines and posting processes.

Social Media
Using all types of social media will ensure that you reach as broad of an audience as possible, since some people only have certain types of social media accounts. Facebook, Twitter, Instagram, and Snapchat are good starting points.

Email
• Email students you know are interested in the event.
• Draft an announcement or advertisement and send the message to your friends, asking them to forward it on. This a great, simple, and free way to spread the word.

Information Posted on a Student Organization’s Website
• Gather text, pictures, and information for the website.
• Get the website up and publicize.
• Post the site’s URL to your student organization registration form.
If a student organization chooses to build a website, they are responsible for developing and maintaining their own site.

Bookstore Promotions
Barnes and Noble at UNC Charlotte • (704) 687-7050 • uncc.bncollege.com
• Meet with the managers.
• Ask for permission to post and leave information by the registers.

Outdoor Billboards/Campus Signs
Popp Martin Student Union, Reservations Office • (704) 687-0430
• Reserve a space for the sign.
• Buy supplies, design and paint the billboard, or use those available in the Student Organization Resource Center.
• Request Physical Plant to place the billboard or sign outside.
This may take some time to design and paint, but it can be placed in high traffic areas and grab people’s attention.

Dining Promotions
Auxiliary Services • auxiliaryinfo@uncc.edu
• Submit digital content for review and consideration to auxiliaryinfo@uncc.edu
• Auxiliary Services will deploy the promotional piece at available dining locations.
• Table tents will no longer be approved as a method of promotion in dining locations; exceptions may be made upon request for University wide events.

Informational and Promotional Tables
Promotional tables are available in the Popp Martin Student Union Lobby and Cone University Center and must be reserved in compliance with the general reservation procedures. Tables and chairs can also be reserved as checkout items from Cone University Center to be used outside of Prospector, at Belk Plaza, and at other outdoor areas on campus. Check with the Conference, Reservations, and Events Services (CRES) Office for designated areas on campus. Tables will be assigned on a first-come, first-served basis, and conflicting activities will not be permitted.

Promotional tables may be used for display and distribution of materials to interested persons; however, active solicitation is strictly prohibited as is outlined in the guidelines of University Policy Statement #601.6 and #601.9. For the complete policies visit legal.uncc.edu/policies/up-601.6 and legal.uncc.edu/policies/up-601.9.
**POSTING AND BULLETIN BOARD USE**

Bulletin boards throughout campus are to be used for hanging notices, bulletins and promotional flyers. An organization taping up flyers will be subject to charges for the removal of the flyer, repair of the surface if necessary, and may be required to forfeit their use of space in the Cone University Center, Barnhardt Student Activity Center, or Popp Martin Student Union. Materials posted in unapproved locations will be removed and discarded. Please do not write or draw on windows or doors.

If you would like to post flyers around campus, please use only general posting boards or get permission from the person responsible for posting requests in that building.

For information and policies regarding posting in and around the Popp Martin Student Union, please visit studentunion.uncc.edu/services/marketing/posting. Also, see University Policy 601.9.

**RESIDENCE HALL POSTING**

Bulletin boards and other approved posting locations in the residence halls are not “General Purpose” and are therefore reserved for use by the Department of Housing and Residence Life (see University Policy 601.9 for further clarification). Notices in these locations will be posted by Residence Life staff and removed at approximately two-week intervals or after the conclusion of scheduled events. Unauthorized postings will be removed immediately. Damage to walls or other surfaces resulting from violation of this policy will require that the individual/group responsible pay the costs of repair, and may be subject to criminal penalties under applicable law and/or to disciplinary action pursuant to University policy.

Exterior campus bulletin boards near the residence halls may be used for commercial purposes, information purposes, or for solicitation of charitable contributions. They may be used by any person or group whether affiliated or nonaffiliated with the University. Please consult University Policy 601.9 (Solicitations, Distribution of Materials, Campus Displays) for information on the use of these areas.

All items to be posted in the residence halls must be approved by the Residence Life staff prior to posting. To receive approval, you may use one of two approaches:

1. Visit the individual building(s) in which you wish to post flyers. Meet with the Residence Coordinator (RC) or Graduate Assistant (GA) to obtain approval. If he/she is not available, you may leave the flyers with a note and he/she will process your request upon his/her return. Once approved, Housing staff will post the flyers for you.
2. Visit the main Housing office in Scott Hall, bringing with you the stack of flyers you would like to approved, distribute, and post. The flyers must be counted out and labeled per building (in accordance with the publicity distribution guidelines, which specifies the number of flyers needed per building).

If you wish to discuss other methods of marketing in the residence halls (attending floor or hall council meetings, setting up an info table in the lobby area, etc.), please contact the main Housing office at (704) 687-7501 or via email at HRLMailbox@uncc.edu.

**EMAIL COMMUNICATION**

Student organizations may not disclose or collect information in emails that they are privileged to access because of their position at the University. Those wishing to transmit broadcast email messages containing essential University announcements to students, faculty, and/or staff must obtain approval from the appropriate administrative authority. Within the scope of their authority, only the offices of a Department Chairperson, Director, Dean, Executive Director, Vice Chancellor, or Chancellor may authorize the transmission of broadcast messages to a wide audience of students, faculty, and staff.

Appropriate broadcast e-mail may include, but is not limited to, the following types of announcements:
- Emergency or unforeseen campus-wide events notification (e.g., cancellation of classes or closing of the University due to inclement weather or emergency);
- Important campus deadline notification (e.g., last day of drop/add for students); or
- Improved services to students, faculty, or staff that directly impact all members of the affected group.

By contrast, broadcast e-mail messages should not be used for non-essential matters such as publicizing campus events. Broadcast email messages should be sent only to the affected group (students, faculty, or staff, or a sub-group of one of those groups) and should be of critical importance to that group. For more information on broadcast emails, please review university University Policy 304, Electronic Communication Systems at legal.uncc.edu/policies/up-304.

**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.
ANNUAL REGISTRATION CHECKLIST

Currently registered student organizations are required to complete an annual registration process with the Student Government Association (SGA). The process must be completed annually by 5:00pm on the second 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.

☐ ATTEND AN ANNUAL REGISTRATION WORKSHOP
At least one new officer must attend a workshop. You can register for a workshop by visiting studentorgs.uncc.edu/workshops. Make note of your presenter and their email address so you have a direct contact later in case you need it.

Date of Workshop Attended: _______________  Name of Presenter: _________________________
Presenter email address: ____________________@uncc.edu

☐ UPDATE ORGANIZATION PROFILE ON NINER ENGAGE
Review your organization’s profile on Niner Engage 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 student organization staff members regarding your profile’s status.

Date submitted: _________________  Date of Approval: ___________________

DO YOU FALL INTO ONE OF THE FOLLOWING CATEGORIES?

All organizations should also make sure they register with any office they are associated with on campus:

☐ Graduate Organizations - If you have 80% or more of graduate student members, you must register with the Graduate and Professional Student Government (GPSG), in addition to the Annual Registration process. For more information about the GPSG chartering process, visit gpsg.uncc.edu.

☐ Sport Clubs - If your organization has the designation of being a Sport Club, you need to complete the Sport Club requirements as outlined by Recreation Services, in addition to the Annual Registration process. For more information about Sport Club requirements, visit recservices.uncc.edu/sport.

☐ Greek Organizations - If you are a Fraternity or Sorority recognized by one of the Greek councils on campus, you must also abide by the Recognition Guidelines established by the Office of Fraternity and Sorority Life. For more information about Greek Life, visit greeklife.uncc.edu.
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
☐ Recruit new members at the Student Organizations Showcase during Week of Welcome
☐ Submit your Affiliate Advisor application (if applicable)
☐ Agree on a regular meeting time and reserve meeting space with CRES
☐ Inform your advisor(s) of meeting times

SEPTEMBER
☐ Plan an interesting and effective first meeting
☐ Set goals for the semester/year
☐ Apply for SGA Funding and plan for upcoming events
☐ Schedule a team-building session for your executive board through Venture (704-687-5253 or venture.uncc.edu/team-building)
☐ Plan a fundraiser event
☐ Volunteer as a group for International Festival (I-FEST)

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

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
MONTHLY PLANNER CONTINUED

☐ Register for Spring Student Organization Showcase
☐ Plan end-of-semester activity
☐ Elect new officers and plan an officer transition retreat (if applicable)
☐ Update Niner Engage profile
☐ Begin planning for spring semester

Remember
• Members are ready for Thanksgiving break
• Members may be stressed and busy with academics

JANUARY
☐ Attend Spring Organizations Showcase
☐ Set new goals and evaluate old goals
☐ Recruit new members
☐ Apply for SGA 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
☐ Continue to work on spring semester goals/activities
☐ Submit nominations for Student Organization Excellence Awards
☐ Register for and attend the SOLD Institute

Remember
• Seniors may be pre-occupied with graduation, finding a job, next steps, etc.
• Members might start stressing about midterms
• Spring Break is coming so be aware of the shortened month
MONTHLY PLANNER CONTINUED

APRIL AND MAY

☐ Complete Annual Registration for next year
  ☐ Attend an Annual Registration Workshop
  ☐ Update Niner Engage Profile
☐ Request storage locker space for next year
☐ Attend the Student Organizations Excellence Banquet & Awards
☐ Elect new officers and plan officer transition retreat (if applicable)
☐ Close current budget and develop new budget for next year
☐ Review successes, accomplishments and areas for growth
☐ Plan an end-of-the-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
  ☐ Complete Annual Registration for next year (if you didn’t get it done by end of May)
  ☐ Attend Annual Registration Workshop
  ☐ Update Niner Engage Profile
☐ Make marketing/recruitment plans for the fall
☐ Register for Fall Student Organizations Showcase

Remember
  • Members might have internship or work commitments that will limit availability and activity
  • Find a way to relax and reflect on your own journey
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 the Student Involvement Office the facilities and assistance available to the student organizations on my campus?
18. Does my organization make use of the assistance and facilities available?
QUESTIONS TO CONSIDER CONTINUED

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?

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...; 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 themself 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.

Want more ideas? Visit http://studentorgs.uncc.edu/resources to find a larger list of Icebreakers and Teambuilders.
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:

_________________________________________________________________________________________

_________________________________________________________________________________________

_________________________________________________________________________________________

_________________________________________________________________________________________

_________________________________________________________________________________________

_________________________________________________________________________________________
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.*
   - List 3-4 key messages that you need to communicate to your audience:
     - 
     - 
     - 
     - 

V. **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?

VI. **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 Specific, Measureable, Attainable, Relevant and Timely.

**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:**

________________________________________________________________________________________

________________________________________________________________________________________

**S.M.A.R.T. Goal:**

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________
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.

<table>
<thead>
<tr>
<th><strong>STRENGTHS</strong></th>
<th><strong>WEAKNESSES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Aspects done right either individually or as an organization. This section contains both strengths within the organization and external strengths, such as community relationships.</td>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>OPPORTUNITIES</strong></th>
<th><strong>THREATS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Factors that represent reasons your organization is likely to prosper such as dynamic recruitment or having created a niche membership on campus.</td>
<td>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.</td>
</tr>
</tbody>
</table>
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?
**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.
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 Chief Auditor at UNC Charlotte.
## Annual Budget Tool

**Organization Name:**

**Contact Name:**

**Date:**

### Expenses

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting Costs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Speakers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room Reservations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Subtotals</strong></td>
<td></td>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th>Events</th>
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<tbody>
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<tr>
<td><strong>Subtotals</strong></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vehicle Rental</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Lodging</td>
<td></td>
<td></td>
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<tr>
<td>Food</td>
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<tr>
<td>Admission</td>
<td></td>
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<tr>
<td>Incidentals</td>
<td></td>
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<tr>
<td><strong>Subtotals</strong></td>
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</tbody>
</table>

### Office Supply Costs

<table>
<thead>
<tr>
<th>Estimated</th>
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<th>Difference</th>
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<tr>
<td><strong>Subtotals</strong></td>
<td></td>
<td></td>
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</tbody>
</table>

### Publicity

<table>
<thead>
<tr>
<th>Estimated</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Graphic Design</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copying/Printing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertisements</td>
<td></td>
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</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Subtotals</strong></td>
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</tbody>
</table>

### Other Expenses

<table>
<thead>
<tr>
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<th>Difference</th>
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</thead>
<tbody>
<tr>
<td>National Dues</td>
<td></td>
<td></td>
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<tr>
<td><strong>Subtotals</strong></td>
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</table>

### Estimated Expenses

<table>
<thead>
<tr>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
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</thead>
<tbody>
<tr>
<td><strong>Totals</strong></td>
<td></td>
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</tr>
</tbody>
</table>
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 Conference, Reservations, and Event Services (CRES) Office to tentatively reserve the date and location for your event. Be mindful of access for individuals with disabilities when planning events. You can download an “Accessibility Checklist for Student Organizations” at studentorgs.uncc.edu/resources.

- **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. Requests for on-campus outdoor events with amplified sound must be forwarded to the CRES Office.

- **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.

- **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:**

**Contact Name:**

**Event Name:**

#### Expenses

<table>
<thead>
<tr>
<th>Item</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
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<tbody>
<tr>
<td>Site</td>
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<tr>
<td>Venue Fees</td>
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<tr>
<td>Site Staff</td>
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<tr>
<td>Equipment</td>
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<tr>
<td>Tables/Chairs/Stage</td>
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<tr>
<td>Other</td>
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<tr>
<td><strong>Subtotals</strong></td>
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<tr>
<td>Decorations</td>
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<td>Flowers</td>
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<tr>
<td>Candles</td>
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<tr>
<td>Lighting</td>
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<td>Ballons</td>
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<td>Paper Supplies</td>
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<td>Other</td>
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<td><strong>Subtotals</strong></td>
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<td>Publicity</td>
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<td><strong>Subtotals</strong></td>
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<tr>
<td>Food</td>
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<tr>
<td>Beverages</td>
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<tr>
<td>Staff &amp; Gratuities</td>
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<tr>
<td>Linens/Dishes/Utensils</td>
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<tr>
<td>Other</td>
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<tr>
<td><strong>Subtotals</strong></td>
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#### Technical Requirements

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<tr>
<th>Item</th>
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<tbody>
<tr>
<td>Sound</td>
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<tr>
<td>Lighting</td>
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<tr>
<td>DJ Services</td>
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<tr>
<td>Equipment Rental</td>
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<td>Other</td>
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<tr>
<td><strong>Subtotals</strong></td>
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#### Merchandise

<table>
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<tbody>
<tr>
<td>Awards/Certificates</td>
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<tr>
<td>Gifts</td>
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<tr>
<td>Other</td>
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<tr>
<td><strong>Subtotals</strong></td>
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#### Miscellaneous

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<tr>
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<tbody>
<tr>
<td>Insurance/Permits</td>
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<tr>
<td>Transportation/Parking</td>
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<tr>
<td>Security</td>
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<td></td>
<td></td>
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<tr>
<td>Faxes/Messages</td>
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<td></td>
<td></td>
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<tr>
<td>Other</td>
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<td></td>
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<tr>
<td><strong>Subtotals</strong></td>
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</table>

#### Total Estimated Expenses

<table>
<thead>
<tr>
<th>Total Estimated Expenses</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subtotals</strong></td>
<td></td>
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</tbody>
</table>

#### Income

| Item                          | Estimated | Actual | Difference |
| Admissions                    |           |        |            |
| **Ticket Charge**             |           |        |            |
| **Subtotals**                 |           |        |            |
| Donations                     |           |        |            |
| **Subtotals**                 |           |        |            |

#### Total Estimated Income

<table>
<thead>
<tr>
<th>Total Estimated Income</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subtotals</strong></td>
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</table>

#### Totals

<table>
<thead>
<tr>
<th>Total Expenses</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subtotals</strong></td>
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</tbody>
</table>

| Total Income                  | Estimated | Actual | Difference |
| Total Profit/Loss             |           |        |            |

**Current Balance:** $
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 by UNC Charlotte.

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 re-assess, 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.
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.

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjourn Meeting</td>
<td>“I move that we adjourn.”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>MAJORITY</td>
<td>NO</td>
</tr>
<tr>
<td>Call and Intermission</td>
<td>“I move that we recess for...”</td>
<td>NO</td>
<td>YES</td>
<td>NO (2)</td>
<td>YES</td>
<td>MAJORITY</td>
<td>NO</td>
</tr>
<tr>
<td>Complain about heat, noise, etc.</td>
<td>“I rise to a question of privilege”</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>MAJORITY</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Temporarily suspend consideration of an issue</td>
<td>“I move to table the motion”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>MAJORITY</td>
<td>NO (2)</td>
</tr>
<tr>
<td>End debate and amendments</td>
<td>“I move the previous question”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>MAJORITY</td>
<td>NO</td>
</tr>
<tr>
<td>Postpone discussion for a certain time</td>
<td>“I move to postpone the discussion until...”</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>MAJORITY</td>
<td>YES (3)</td>
</tr>
<tr>
<td>Give closer study of something</td>
<td>“I move to refer the matter to committee”</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>MAJORITY</td>
<td>YES (4)</td>
</tr>
<tr>
<td>Amend a motion</td>
<td>“I move to amend the motion by...”</td>
<td>NO</td>
<td>YES</td>
<td>YES (3)</td>
<td>YES</td>
<td>MAJORITY</td>
<td>YES</td>
</tr>
<tr>
<td>Introduce business</td>
<td>“I move that...”</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>MAJORITY</td>
<td>YES</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Protest breach of rules or conduct</th>
<th>“I rise to a point of order”</th>
<th>YES</th>
<th>NO</th>
<th>NO</th>
<th>NO</th>
<th>NO</th>
<th>VOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vote on a ruling of the Chair</td>
<td>“I appeal from the chair’s decision”</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>MAJORITY</td>
<td>YES</td>
</tr>
<tr>
<td>Suspend rules temporarily</td>
<td>“I move to suspend the rules so that...”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>2/3</td>
</tr>
<tr>
<td>Avoid considering an improper matter</td>
<td>“I object to consideration of this motion”</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>2/3 (17)</td>
</tr>
<tr>
<td>Verify a voice vote by having members stand</td>
<td>“I call for a division or “Division””</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>VOTE</td>
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<tr>
<td>Request information</td>
<td>“Point of information...”</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>VOTE</td>
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<tr>
<td>Take up a matter previously tabled</td>
<td>“I move to take from the table...”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>VOTE</td>
<td>NO</td>
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<tr>
<td>Reconsider a hasty action</td>
<td>“I move to reconsider the vote on...”</td>
<td>YES</td>
<td>YES</td>
<td>YES (6)</td>
<td>NO</td>
<td>MAJORITY</td>
<td>NO</td>
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**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 negative 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.
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.
## IMPORTANT CONTACTS LIST

### Organization Information
*(Complete all applicable)*

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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.

The Officer Transition Guide is adapted from materials by A. Jankord, Student Unions & Activities, University of Minnesota, 2016.
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)
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?
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 OrgSync tied to your group-specific UNC Charlotte 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)
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
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

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

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.