STUDENT ORGANIZATION ADVISOR TRAINING

Dustin Lewis (he/him)
Associate Director
WHAT DO WE DO?

Orientation

Campus Activities & Events

Gallagher Student Center

Leadership Programs

Clubs & Organizations

Student Government
• Advisor Role & Expectations
• Financial Practices & Policies
• Event Policies
• Space Reservations
• Student Domestic Travel
• OrgSync
• Baseline Program (new)
• Advisors should have an ongoing relationship with the officers and/or members of the organization
• Advisors serve as mentors
• Advisors hold fiduciary responsibilities to the university for the club
• Advisors are required for our clubs because the university wants to ensure there is active risk management and harm reduction involved with our students
• Advisors are integral to learning
Student Organization Classifications

Student organizations are classified based on several criteria

• Their function for the student body
• Their accountability to a department or office
• Their recognition granted by the SGA or another university dept.
• Their relationship with a university staff or faculty advisor
• Their access to various university resources (funding, space, etc)
• Their level of risk posed from their activities

Clubs
University-Affiliated Organizations (UAOs)
Subordinate Bodies

Club Sports
Student Working Groups
Limited Affiliation Groups
Online Budget Review – OrgSync Checkbooks

Log onto www.OrgSync.com

In the group’s portal, select the “Treasury” tab and “Manage Checkbooks”

Current Balance
(Updated Daily from Banner)
Office of Student Involvement staff serve as the Budget Administrators for all 81**** funds, also known as student club funds.

Financial Spending Workflow:

1. Students Initiate Expenditure
2. Advisor Approves Expenditure
3. OSI Verifies & Authorizes Expenditure
4. Financial Admin Executes Expenditure

University offices and departments use XavierBuy to execute most of their spending. Our clubs are able to continue using paper forms (found on our website) to access their funding. If your financial practices are supported by another staff or administrative assistant, XavierBuy can be used for spending purposes.
Check Request

Used to pay vendors OR to reimburse a student for more than $300. Vendor payments are tracked for IRS reporting. Students are reimbursed via check over $300 due to limited daily cash available in the Bursar’s Office.

- Check Requests must have an invoice and W-9 IRS form attached in order to process payment.
- Hourly employment (Disc Jockey, Graphic Design, etc) must be tracked due to ACA standards of employment. No exceptions are granted, per HR and Student Employment.
**Student Cash Reimbursement**

- Students can be reimbursed for purchases up to $300 in cash from the Bursar. Advisors cannot be reimbursed using this form.

- All employee reimbursements go through Xavier Buy. Advisors needing to be reimbursed for expenses should give scanned copies of receipts to the club treasurer and ask them to forward to me for processing. If your department has access to XavierBuy, you are welcome to enter and process your own reimbursement.
Student Cash Advance
Students can withdraw up to $300 of cash at a time. Cash may be used to purchase goods but students must return receipts along with unspent cash to the Bursar.

• Vendors cannot be paid in cash for any type of service or contractual performance. This includes payment via giftcard.

• Services, including students performing a service such as DJ or graphic designer, cannot be paid in cash or giftcard. Students are asked to close out their outstanding advances within 5 business days using the bottom portion of the original form.
Contract Signature Authority

Many organizations will request to enter into a contract or legal agreement at some point throughout the year. In the past, the practice has been that contracts can only be signed by Xavier faculty and staff members. Effective this past year, the details of this practice have been refined by best practices from Financial Administration.

Student Organizations, receiving their authority and finances from within Student Affairs, are subject to the policies as defined within the Provost area. Performance Agreements should be used to contract performers / lecturers. Any performer contract under $5,000 can be executed by Student Involvement. Under $10,000 can be executed by Student Affairs. Over $10,000 will require signature from the Provost. Please work with Student Involvement when contracting any artists or performers.

Realistically, expect delays for any contract routing over $5,000.
Contract Signature Authority, continued
Advisors are permitted to enter into facility-use agreements.

Advisors can enter into contracted services such as catering, equipment rental or similar.

Advisors can enter into event rentals. When it comes to renting inflatable or novelty equipment, the club should work with Student Involvement to ensure that necessary risk and liability paperwork is made available when necessary for events and activities.

When in doubt, just ask. Work with club leaders to ensure that you have plenty of time!
Fundraising
Student Organizations are required to register all fundraising activities, including:

• Sales to members (t-shirts or club gear)
• Sales to individuals outside of the club (including those outside of Xavier)
• Letter-writing campaigns
• Dues Collection
• Working an event in an effort to generate revenue (such as concessions at a game)
• Collected donated items for charity (such as disaster relief or food donations)

Student groups are prohibited from selling homemade baked goods.

When fundraising for charitable/philanthropic purposes, the organization needs to carefully track any funds raised and is responsible for processing the entire donation as a payment to the charity through the university.
**Outdoor Space**
Outdoor Space Reservation Form and Policy are available online through OrgSync or on the Student Involvement webpage. Student organizations must request, in advance, to reserve an available space.

Currently, there is a separate Outdoor Posting Form where groups can request to install flags or signage outside in certain spaces designated by Physical Plant Grounds.

**Fenwick Place Atrium**
Student organizations are able to formally reserve Fenwick Place Atrium (outside the caf) to table information or sell items. This form is found online in OrgSync.
University Protocol for Campus Public Speakers and Events
When hosting a public speaker or event, student organizations must have approval before advertising and hosting a speaker or lecturer. This form is available on OrgSync and requires approval from Student Involvement, Student Affairs and the Provost.

Controversial events will not be denied on the basis of controversy but will be considered on how the university may best prepare a response.

Academic Freedom does not, inherently, apply to student organization events, however, a club can collaborate with either a professor or Academic Department.
Student Lobbying, Political and Campaign Activities Policy

Due to the University’s designation within the IRS, the university is limited in its ability to participate in political campaigns. Student organizations have the opportunity to participate in certain kinds of lobbying and political campaign-related activities. The University cannot be seen as endorsing any political candidate or party.

Begin all planning for political activities by contacting the Office of Student Involvement, who will consult with Government Relations.
Hosting Student Events with Alcohol

Events where alcohol is to be served require permission, per the Alcohol & Other Drugs Policy. Request forms must be submitted several weeks in advance of the program.

Primary concerns for receiving approval include:

• The consumption of alcohol may not be the focal point of the activity; the event must clearly have other primary entertainment or educational functions
• The majority of attendees must be over the age of 21
• The advisor must be present for the duration of the event
• The advisor must take responsibility for ensuring policy enforcement
• Events must take place between 12pm-1am
• Non-alcoholic beverages and food must be provided, free of charge
• On campus events must use Xavier Catering / Chartwells
• Security is required
Final Day for Campus Programming
The cut off each semester for student events is on the Friday before finals week at midnight. Campus events can resume once finals have officially ended for the semester.

Gambling Policy
In short, money cannot be exchanged for betting, split the pot, or cash prizes with a raffle.

Brand Use
All apparel or promotional items should be submitted for approval to Marketing & Communications via the Promotional Materials & Apparel Approval Form in OrgSync. Student organizations are limited to using either the official university brand or secondary.
Motion Picture Copyright Policy

Copyright law prohibits a student organization from screening a feature film or documentary without a public license.

Educational exemptions are limited to when an instructor uses the film as part of their regularly scheduled course and when the attendance is limited to students enrolled in the course.

Clubs cannot bypass the licensing by partnering with a class or by having a professor as a faculty advisor for their group.
Incident Reporting
Emergency Response – on campus x1000; off campus 911
1. Respond to the immediate need of the situation (see above)
2. Document the incident. Try and capture names of students involved and their All Card numbers. Write up a narrative timeline of events.
3. Send documentation to Student Involvement. If the incident clearly violated Xavier’s Student Code of Conduct, you may also forward the documentation to the Dean of Students and/or TIX.

Advisors are mandated reporters – with very few exception (clergy role or confidential advocate role). We are also Clery Act Campus Security Authorities (CSAs) and are required to complete an annual training (currently you should complete this by Thursday, 9/12) per Lt. Adrian Fuller.

There may be times when an advisor is aware of a rumored situation. When the situation violates policies or laws, we ask that you either follow up on your end or you are welcome to report this to OSI and we will follow up on ours along with appropriate campus partners.
Student Domestic Travel Itinerary

Student organizations are only required to complete this form if
- Domestic event or activity that occurs beyond 20 miles from campus or
- Event or activity includes an overnight stay

Chaperone Requirement

The need for a chaperone is determined for each trip based upon a review of the risk associated with that experience, using the Student Domestic Travel Risk Matrix. Some factors used to determine the need for a chaperone within the Matrix, include:
- Distance from campus
- Duration of travel (time away from campus)
- Number of participants
- Purpose of travel
- Type of activities taking place, such as structured or unstructured

In most cases, trips with high risk activities or extended time away from campus will require a chaperone that in most cases will be a full time employee at Xavier.
Chaperone Expectations
The role of the chaperone is to educate and coach students on making good choices while traveling which subsequently can reduce risk to the university and liability to students and chaperones.

The following are a list of expectations for chaperones:
• Complete training as a Clery Campus Security Authority (CSA)
• Arrange to travel with the group from point of origin to final destination and to stay with the group for overnight trips for the entire travel period
• Abide by all applicable University policies and procedures – students are not permitted to drink alcohol while traveling on a student organization trip. See the Alcohol & Other Drugs Policy for further clarification.
• Assist students with logistical planning to reduce risk and enforce safety precautions
• Provide supervision and monitor student behavior on the trip
• Act as a resource for alternative ideas or solutions in any travel-related issues or concerns.
• Chaperones should never share accommodations alone with a student
Baseline Program

When clubs and organizations are active and thriving, the campus is vibrant with energy, activities and opportunities for students to engage with one another, creating both a sense of community and belonging. When clubs and organizations are inactive, students have a sense of there not being much to do here and that the campus community does not have enough opportunities. The purpose of this program is to set a minimum level of expectations (or baselines) by which student organizations should meet and exceed in order to remain active and funded at Xavier.

Participating Organizations

Clubs will be required to participate in the Baseline program. This does not apply to Subordinate Bodies, University-Affiliated Organizations, Student Working Groups, Limited Affiliation Groups or Club Sports.

Baseline Objectives

1. Increase the amount of times that a club meets over the course of each semester
2. Increase the amount of interaction that a club has with their faculty/staff advisor
3. Increase the amount of both membership recruitment and retention that a club has throughout the year
4. Increase the amount of programming and events that a club provides to the larger university community
5. Increase the amount of service engagement that a club has with the larger community
6. Increase the overall usage of the Student Activity Fee along with SORF and fundraising efforts
7. Increase the amount of ongoing communication that a club has with the OSI-GSC-CS
Baseline Minimum Standards

Meeting Requirements: Clubs will be required to hold at least one general member meeting per month. Based on the academic calendar, the club should meet at least 3 times in the fall (September, October, and November) and 4 times in the spring (January, February, March, and April). The club will be required to document meeting minutes (some details of the meeting business) and submit the agenda/minutes each month via OrgSync for verification.

Faculty/Staff Engagement: Club officers and/or general members should meet with faculty/staff advisors at least once per month. This should occur at least 7 times throughout the year. The club will be required to document advisor meetings and submit the agenda/minutes each month via OrgSync to Student Involvement for verification of this requirement.

Membership Recruitment & Retention: Clubs will be required to create a recruitment and retention plan for the fall and spring semester, detailing the steps the group is taking to both recruit new and retain new and existing members.

Programs & Events: Clubs will be required to hold at least 2 events per semester, outside of a regular club meeting.

Service Engagement: Being integral to who we are as a Jesuit Catholic institution, Clubs will be required to participate in one service activity per year, as a club with a goal of participation from 80%+ of the roster.

Student Activity Fee Usage: Clubs will now be required to spend 85% or more of the funds allocated from SGA during the fiscal year toward club activities, events and approved travel.
Loss of Privileges and Recognition
Student Involvement has the authority to intervene with student organizations in order to promote or limit their operations as necessary. Intervention may include a loss of privilege(s) and/or recognition.

Relevant interventions may include
• Mandated trainings
• Revocation of reserved spaces
• Suspension of activities and/or operations
• Cancellation of programming
• Probationary periods for the organization
• Revocation of recognition

The decision to intervene may be the result of violation of university policies, failure to re-register/re-activate, failure to adhere to a student organization responsibility.
**Student Organization Resource Fund (SORF)**
The SORF Board allocates supplemental funding to Clubs from the Student Activity Fee. Eligible submissions are considered for requests related to events, trips or equipment.

SORF Requests are due on Friday afternoons prior to the Tuesday hearing.

**Friedlander Family Fund**
The Friedlander Family Fund was created to reduce financial barriers for students who, based on financial aid and need, would be limited from experiences such as retreats, campus programs, events or conferences with participation costs/fees.

Friedlander Family Fund requests are reviewed weekly.

**Student Emergency Fund**
This fund exists to support students in times of crisis or emergency.
Mid-Year Reporting
Student organizations are required to submit a mid-year report at the end of the fall semester. This report will include details about events held throughout the fall and will also administer a survey tied to our HLC Student Learning Outcomes for clubs. Groups will also report their active roster/membership.

Year-End Reporting
A year-end report is also required at the end of the spring semester. This report includes program event details, active roster and also some feedback questions about the experience throughout the year.

Renewal
Tied to the year-end report, groups are required to report their new officer team in OrgSync and update their Advisor Agreement Forms for the new year.
**Student Organization Workshops:** August 19-23  
**Week of Welcome:** August 18-27  
**Club Day:** August 28, 11am-2:30pm  
**Fall Semester New Club Activation Window:** August 19 - September 23  
**Student Organization Academy:** September 7, 10:30am-4pm  
**Mid-Year Report Available on OrgSync:** November 4  
**Mid-Year Report Due:** December 6  
**Final Day for Campus Events and Programming for Fall Semester:** Midnight, December 6  
**Winter Week of Welcome:** January 13-18  
**SGA Budget Request Available for UAOs and Subordinate Bodies:** January 13 – February 3  
**Winter Club Day:** January 22, 11:00am–2:00pm  
**SGA Club Budget Submissions:** February 3 – March 6  
**Club Reactivation, Year End Report, and Advisor Agreement Form Due:** May 1  
**Final Day for Campus Events and Programming for Spring Semester:** Midnight, May 1
QUESTIONS?