



**Samford University**  
Student Leadership and Involvement

**University Recognized**  
**Student Organization Manual**

Office of Student Leadership & Involvement

[lead@samford.edu](mailto:lead@samford.edu)

(205) 726-2471

## TABLE OF CONTENTS

|                                                 |    |
|-------------------------------------------------|----|
| Welcome.....                                    | 3  |
| University Departmental Guide.....              | 4  |
| Student Organization Management.....            | 5  |
| Introduction.....                               | 5  |
| Definition.....                                 | 5  |
| Criteria.....                                   | 6  |
| Process for Recognition.....                    | 6  |
| Advantage of University Recognition.....        | 9  |
| Maintaining University Recognition.....         | 9  |
| Advisor Expectations.....                       | 11 |
| Organizational Considerations for Advisors..... | 11 |
| Changing Advisors.....                          | 11 |
| Student Government Association Funding.....     | 12 |
| Financial Operations.....                       | 12 |
| University Policies.....                        | 14 |
| MarketingPolicies.....                          | 14 |
| Honor Pledge.....                               | 16 |
| Appendix: Organization Resources.....           | 17 |
| Intent to Organize.....                         | 17 |
| Intent to Reorganize.....                       | 18 |
| Membership List.....                            | 19 |
| Agency Fund Account Request Form.....           | 20 |
| Sample Constitution and Bylaws.....             | 21 |
| Transition Checklist.....                       | 25 |
| Sample Agenda.....                              | 28 |
| Sample Minutes.....                             | 29 |
| Goal Setting Worksheet.....                     | 30 |
| New Student Organization Flowchart.....         | 32 |
| Event Planning Flowchart and Timeline.....      | 33 |

Greetings!

We are glad you're interested in being involved in student organizations at Samford. Co-curricular involvement at any university is intended to enhance learning within the classroom, and joining or starting a student organization is a great place to start. The Office of Student Leadership & Involvement is a resource for Samford students and over 100 registered student organizations through advising, leadership training, and organizational support. The Office of Student Leadership & Involvement seeks to transform students by promoting and practicing the thoughtful expression of faith, learning, leadership, and service.

Whether you attend an event on Ben Brown, engage with the Birmingham community through service, or plan a campus-wide program as part of a committee, you are helping to shape the Samford experience for yourself and your fellow students. More information about student organizations, involvement opportunities, and leadership programs can be found at [www.samford.edu/leadership](http://www.samford.edu/leadership).

If at any time throughout the year you have questions, concerns, or need clarification regarding the information in this handbook, or you need more information or assistance with a student organization, contact us at [lead@samford.edu](mailto:lead@samford.edu). We wish you and your student organization a productive and successful school year.

Sincerely,

The Office of Student Leadership & Involvement

## UNIVERSITY DEPARTMENTAL GUIDE

The following departments offer resources to student organizations:

### **Facilities Management**

205-726-2711

[www.samford.edu/departments/facilities-management](http://www.samford.edu/departments/facilities-management)

### **Marketing and Communication**

Samford Hall 310

[www.samford.edu/departments/marketing](http://www.samford.edu/departments/marketing)

### **Residence Life**

University Center, 3rd Floor

205-726-2956

[www.samford.edu/residence-life](http://www.samford.edu/residence-life)

### **Samford Dining/Catering**

Ralph W. Beeson University Center

[www.samford.edu/departments/dining](http://www.samford.edu/departments/dining)

Catering: <https://samford.catertrax.com/>

### **Spiritual Life**

Burns Hall 200 Suites

205-726-2825

[www.samford.edu/spiritual-life](http://www.samford.edu/spiritual-life)

### **Student Leadership and Involvement**

University Center 256

205-726-2471

[www.samford.edu/leadership](http://www.samford.edu/leadership)

### **Title IX Coordinator, Dr. Tim Hebson**

University Center 252

205-726-2764

[thebson@samford.edu](mailto:thebson@samford.edu)

### **University Services**

HUB, Ralph W. Beeson University Center

205-726-2752

## STUDENT ORGANIZATION MANAGEMENT

### Introduction

*The Office of Student Leadership and Involvement seeks to transform students by promoting and practicing the thoughtful expression of faith, learning, leadership, and service.*

### Request for University Recognized Organization Status

This manual is designed to assist you in submitting information concerning the formation and recognition of a student organization. The criteria of university recognized organizations and process for recognition is outlined on pages 6-8 on the manual. If approval is not granted, the application process is concluded and any provisional status of the organization is terminated.

You will be notified through the Office of Student Leadership and Involvement of the status of your organization's petition throughout the recognition process. ***The new student organization recognition process customarily requires up to two semesters.***

Contact the Office of Student Leadership and Involvement if you have questions or need additional information.

### Definition of a Student Organization or Club

A club or organization is a group of currently enrolled Samford University students who organize for a common purpose, for which they do **not** receive academic credit.

Any group of students that meets regularly, elects officers, collects dues, offers programs or events, or that otherwise functions on an ongoing basis is required to have university recognition.

### Student Organizations Needed for Accreditation Purposes

Honor societies and professional student organizations required by academic programs for accreditation purposes may be eligible for a modified recognition process. Such recognition is considered by the Office of Student Leadership and Involvement on a case-by-case basis.

## Criteria of University Recognized Organizations

For an organization to receive university recognition, and to maintain university recognition, it must satisfy the following criteria:

1. The organization must support and enhance the mission, vision, and values of the university in one or more of the following ways:
  - a. Nurturing persons
  - b. Providing learning experiences (social, physical, spiritual, academic, emotional, intellectual, and/or career)
  - c. Developing the personal empowerment of participants
  - d. Developing academic/career competency
  - e. Developing social/civic responsibility
  - f. Promoting ethical and spiritual wellbeing
  - g. Continuously improving the effectiveness of the community
2. There must be interest among currently enrolled students
3. There must be no other recognized organization with a similar purpose
4. The organization must have a full-time faculty/staff advisor.
5. The organization must renew every year and any time there is a change of officers or advisor(s).

## Process for Recognition

To create and receive university recognition of a student organization, the following is required:

1. Contact the Office of Student Leadership and Involvement (the “OSLI”) at [lead@samford.edu](mailto:lead@samford.edu). Include in the email the proposed name of the organization and an explanation of why the organization should receive university recognition.
2. Create a membership roster of the names and samford.edu email addresses of at least ten (10) students willing to be charter members of the organization. The format of the membership roster is in the Appendix.
3. Secure the agreement of at least one full-time university faculty or staff member to serve as advisor to the organization. Organizations may have more than one advisor.
4. Create a constitution under which the organization will operate. A sample constitution is in the Appendix. The constitution must be approved by a majority of the charter members of the organization.

## STUDENT ORGANIZATION MANAGEMENT

5. Complete the student organization registration form at [Bulldog Central](#) by selecting *Forms*, then *Organization Registration*. Select “New Student Organization” as the organization type. You will also be required to upload the membership roster, list of officers, and constitution on the registration form.

6. Upon completion of online registration and document submission, schedule a meeting with the OSLI. The President, Treasurer, and Advisor for the organization must attend the meeting. Student leaders of the organization and OSLI personnel review the organization documents and discuss the purposes, membership and formation of the organization. OSLI may recommend revisions to the submitted documents. Additional meetings may be requested by student leaders or required by the OSLI.

Note: Faith-based organizations and club sports require additional consultation and approval. If a proposed organization is either faith-based or a sports club, contact:

Faith-based: [osl@samford.edu](mailto:osl@samford.edu)

Club sports: [camprec@samford.edu](mailto:camprec@samford.edu)

7. Once the organization completes the registration process and satisfactorily completed the meeting or meetings required by the OSLI, the organization can be considered by the Vice President for Student Affairs and Enrollment Management for provisional status. However, before granting provisional status, the Vice President for Student Affairs and Enrollment Management will deliver to the Student Affairs and Enrollment Management Committee (the “Board Committee”) copies of the organization’s registration, membership roster, constitution and advisor designation, and respond to any inquiries of the Committee. If the Chair determines that the Board Committee should consider the registration of the organization, provisional status shall not be granted until the Board Committee meets and its comments and inquiries concerning the organization are addressed by the Vice President for Student Affairs and Enrollment Management.

8. The OSLI shall establish the dates during which an organization shall exist with provisional status. The provisional status may be extended by the Vice President for Student Affairs and Enrollment Management.

9. An organization with provisional status may host one interest meeting and one interest table event per provisional semester. Organizations with provisional status may also conduct member meetings throughout the provisional term(s) or period. The organization’s advisor is

## STUDENT ORGANIZATION MANAGEMENT

responsible for reserving university facilities for these events.

10. Upon satisfactory completion of the provisional period, the organization will present its application for university recognition to the SGA Senate Student Life Committee, which will recommend to the SGA Senate that the application for recognition (i) be granted as submitted, (ii) be granted contingent upon satisfaction of such conditions that the committee may prescribe, or (iii) be denied

11. The SGA Senate shall receive the recommendation of the SGA Student Life Committee and vote to (i) approve the application as submitted, (ii) approve the application contingent upon the satisfaction of certain conditions, or (iii) deny the application. If the SGA Senate votes to approve the application (with or without conditions), it will be sent to the Vice President for Student Affairs and Enrollment Management. If the application is denied, the organization shall cease to have any recognition by the university, whether provisional or otherwise.

12. The Vice President for Student Affairs and Enrollment Management will either request changes, approve or deny the application. Upon such approval, the organization will be entitled to all privileges granted to university recognized student organizations.

13. A university-recognized student organization may apply for a university agency account by completing the agency account request form in the Appendix and delivering it to the OSLI. An agency account allows a recognized student organization to have a university bank account for the deposit and withdrawal of funds. Only student organizations with an agency account may receive SGA Senate funding.

**Note:** Should questions arise regarding a new student organization, other campus stakeholders may be consulted, including the Faculty Campus Life Committee and relevant faculty, staff, and administrators.



## STUDENT ORGANIZATION MANAGEMENT

### Advantages of University Recognition

A university-recognized student organization may:

- Host events; schedule events on the university calendar; reserve and use university facilities and resources for meetings and events
- Enlist a faculty/staff advisor who will support, encourage, advise, and otherwise help the organization fulfill its objective
- Be included in university publications and communications
- Participate in the Student Organization Fair
- Apply for Student Organization Awards
- Have a portal in Bulldog Central
- Use bulletin boards and other on-campus resources for student organization marketing
- Use social media platforms to promote the organization
- Apply for Student Government Association funds if undergraduate student organization or graduate funds if graduate student organization
- Open an agency account with Accounting and Financial Services at no charge, to facilitate financial transactions (Agency Fund Request form available in manual).

### Maintaining University Recognition

Once an organization is recognized, an annual online renewal must be submitted to the Office of Student Leadership and Involvement. This information can be submitted by revising your organization profile information in Bulldog Central. If a recognized organization fails to renew or if an organization decides to become “inactive” for a period of one (1) academic year or less, the organization can petition the Office of Student Leadership and Involvement to be reinstated as an active organization. This petition includes resubmitting a list of at least ten interested organization members (name, email, and class standing) as well as an updated organization constitution. The organization will be reinstated as “active” if the organization meets the criteria for University recognized organizations.

If a recognized organization remains inactive for more than one (1) academic year, the organization must then re-apply for recognition. Any organization that is inactive for one year and does not become active the second year will cease to be recognized as an official university organization.

If at any time an organization no longer meets its original stated purpose and/or the mission

## **STUDENT ORGANIZATION MANAGEMENT**

and purpose of the university, the organization will lose its university recognition.

## STUDENT ORGANIZATION MANAGEMENT

### Advisor Expectations

Student organizations are required to have a minimum of one full-time faculty or staff member serving as an advisor. Part-time faculty or staff members may serve as secondary advisors if one full-time employee is the primary advisor of record.

The student organization advisor's role is as follows:

- Review all organization events and promotional materials submissions
- Serve as the responsible party for the organization's on-campus Agency Account
- Assist students in articulating a vision and mission for the organization and its programs
- Serve as a resource on relevant university policies, procedures, resources, and programs
- Act as a consultant in areas such as organizational planning, goal setting, problem solving, and upholding the organization's guidelines and purpose

### Organizational Considerations for Advisors

Organizations should give the following considerations to their advisors:

- The leadership team of the organization is expected to consult advisor(s) well in advance of all activities, to ensure the activities are consistent with the university's mission, policies and procedures, and are in the best interest of the organization and its members.
- The organization is to keep the advisor informed of all organization business. It is expected that advisors are welcome at any meeting (committee or executive meetings included).
- Students are expected to recognize the major responsibilities of an advisor and coordinate all activities of the organization with the advisors.

### Changing Advisors

If the organization wishes to replace an advisor, or if the advisor wishes to no longer serve as advisor to the organization, the leadership must take the following steps:

1. Meet with the advisor to discuss concerns regarding the advisor's role in the organization and/or to brainstorm a replacement advisor for the organization
2. Notify the Office of Student Leadership & Involvement of the advisor change and update Bulldog Central portal
3. If necessary, inform the advisor that he/she has been removed from his/her responsibilities as advisor to the organization
4. If necessary, work with the Office of Student Leadership & Involvement to establish new advisor and to transfer any necessary responsibilities over to the new advisor.

## STUDENT ORGANIZATION MANAGEMENT

If organizations cannot immediately locate a replacement advisor, the organization may continue to exist for a grace period of one semester with guidance from the Office of Student Leadership & Involvement, but the organization will not be able to host events, order promotional items, or access the group's agency account without an active advisor

### Student Government Association Funding

Undergraduate student organizations are eligible to submit a funding request to the Senate if the organization meets the following requirements:

1. Is officially recognized by Samford University and the Office of Student Leadership and Involvement
2. Has an active agency account with Samford University for the purposes of maintaining and distributing funds related to the organization
3. Is not an individual Greek Chapter -- only Greek governing councils may receive funding for open activities

Organizations can request funds from SGA Senate. Senate Funding requests are made through Bulldog Central. Funds are accepted on a rolling basis, but funding requests submitted by the first deadline are given priority consideration.

For the most updated and detailed funding guidelines, please see the Code of Laws. The Code of Laws can be found online at [www.samford.edu/sga](http://www.samford.edu/sga). Please direct questions to [sga@samford.edu](mailto:sga@samford.edu).

### Graduate Student Services – Event Funding

Graduate student organizations are eligible to submit a funding request to the Office of Student Leadership and Involvement, if the organization meets the following requirements:

1. Is officially recognized by Samford University
2. Has an active agency account with Samford University for the purposes of maintaining and distributing funds related to the organization

### Financial Operations

Student Organizations can request an on-campus agency account by turning in the agency account request form, which can be found on Bulldog Central or in the appendix of this manual. The organization's full-time faculty/staff advisor is the responsible party for this account. Agency account information will be stored in the organization's Bulldog Central portal.

## STUDENT ORGANIZATION MANAGEMENT

Organizations who wish to have an off-campus bank account may do so, however, the account must be in the advisor's name. The Office of Student Leadership and Involvement does not assist with the setup of off-campus accounts.

PaySource cards are available for student organizations who cannot pay out of pocket. Information on PaySource cards can be found [www.samford.edu/departments/accounting](http://www.samford.edu/departments/accounting). Agency account information is needed to obtain a PaySource card.

### Tax Information

Recognition by the University does not imply tax-exempt status and student organizations are not allowed to use the University's EIN (Employer Identification Number) number or non-profit status. Student organizations are independent entities responsible for their own finances and establishing and maintaining their tax status with the IRS.

Student organizations are not Federally Tax-Exempt Non-profit Organizations. Only the federal government can confer charitable status on an organization. Filing for charitable status (501(c)(3) status) is a lengthy legal procedure that commits the organization to the rigorous annual reporting procedures required by the IRS. Because of the annual reporting requirements and the frequent turnover of student leadership, we do not encourage student organizations to file for charitable status.

The easiest way to apply is online through the IRS website. You will be walked through the application and receive your number immediately. You can also apply by mail or over the phone. If your on-campus student organization is part of a larger entity, please communicate with the inter/national group regarding tax-exempt status.

## UNIVERSITY POLICIES

### Student Handbook

Please refer to the Student Handbook for comprehensive official university policies. The handbook can be found at [www.samford.edu/departments/values-advocacy](http://www.samford.edu/departments/values-advocacy).

**Disclaimer:** Students are expected to know regulations and policies found in the current Student Handbook. Keeping abreast of the school calendar, critical deadlines, and all university mail received in one's university mailbox and/or e-mail is also the student's responsibility. Samford University reserves the right to change the policies, procedures, rules, regulations, and information in this handbook at any time. Changes become effective at the time the proper authorities so determine and the changes apply to both prospective students and those already enrolled. This manual is a general information publication only, and it is not intended to nor does it contain all regulations relating to students. This Student Organization Manual is not a contract and may not be construed as any part of a contract between Samford University and any student or student's representative. Samford University is an Equal Opportunity Institution that complies with applicable law prohibiting discrimination in its educational and employment policies and does not unlawfully discriminate on the basis of race, color, sex, age, disability, or national origin.

Policies on the following topics, in addition to others, can be found in the Student Handbook: Organizational Behavior, Student Leadership Criteria, Hazing Policy, Publicity, and Events.

### Marketing Policies

#### Selecting Art or Language

Student organization marketing materials that include flyers, social media, t-shirts, and any other promotional items or advertisements may not contain any of the following:

1. References to Alcohol
2. References to Drugs
3. Racial or Discriminatory Language or imagery
4. Graphics or Language of a Derogatory Sexual Nature

#### Art Review

All artwork, including organization logos, for student organization products must be submitted and approved through the *Marketing and Promotion Approval Form* [HERE](#).

## UNIVERSITY POLICIES

An authorized employee from Student Leadership & Involvement and/or Greek Life will provide written notice that artwork has been reviewed and approved by staff and the student organization advisor. If using any University marks, registered trademarks, or the Samford name, the artwork and approval will be submitted to the university's Vice President for Marketing and Communication (or his/her designee) for approval. Licensing information and brand standards can be found at [www.samford.edu/departments/marketing](http://www.samford.edu/departments/marketing).

## **The Samford University Honor Pledge**

### **Preamble**

Samford University's motto—For God, For Learning, Forever—brings together our commitment to our Christian heritage, the pursuit and transmission of knowledge, and the enduring virtues. Only a particular kind of person and institution can fulfill such a demanding motto. To do this, the individuals who form the Samford community must embrace honor in all areas of life and scholarship. Thus, an honor pledge is an appropriate way for the Samford community to live out its motto.

### **Honor Pledge**

I believe that the members of the Samford community possess dignity and are worthy of honor. I understand that honoring others fosters academic achievement, personal growth, and spiritual development.

I commit to hold myself and my peers to the standards of conduct and academic integrity maintained by the University.

To this I pledge my sacred honor.

For God, For Learning, Forever



## APPENDIX: ORGANIZATION RESOURCES

### Intent To Organize

Information must be submitted online via Bulldog Central. This document is for information purposes only. No paper request will be accepted.

Full Organization Name: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

Department Affiliation if any: \_\_\_\_\_

President Name: \_\_\_\_\_

President Phone Number: \_\_\_\_\_ President E-mail Address: \_\_\_\_\_

Meeting Day and Time: \_\_\_\_\_

Treasurer Name: \_\_\_\_\_ Treasurer E-mail Address: \_\_\_\_\_

Faculty/Staff Advisor: \_\_\_\_\_ Advisor E-mail Address: \_\_\_\_\_

Advisor School Title: \_\_\_\_\_

Selection Process, if any: \_\_\_\_\_

\_\_\_\_\_

Number of members for current academic year: \_\_\_\_\_ Organization Type: \_\_\_\_\_

Rationale for organizing (include purpose of organization):

- Submission of at least ten (10) chartering student members required.
- Submission of organization's proposed constitution and/or by-laws is required.

## APPENDIX: ORGANIZATION RESOURCES

### Intent to Reorganize

Information must be submitted online via Bulldog Central using the “Student Organization Intent to Reorganize” form. This document is for information purposes only. No paper request will be accepted.

For inactive organizations (less than one academic year) seeking reinstatement, please fill out the following form. In order to be reinstated, organizations must also contact the Office of Student Leadership and Involvement at [lead@samford.edu](mailto:lead@samford.edu) to set up a meeting, during which the organization’s status will be reviewed. Organizations must also submit an organization renewal on Bulldog Central to be fully reinstated.

Name of Organization: \_\_\_\_\_

Department affiliation, if any: \_\_\_\_\_

Main Student Contact: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Samford E-mail: \_\_\_\_\_

Faculty/Staff Advisor: \_\_\_\_\_ Advisor E-mail: \_\_\_\_\_

Advisor’s School Title: \_\_\_\_\_

Reason organization has been inactive:

Changes made to ensure the organization does not go inactive again:

## APPENDIX: ORGANIZATION RESOURCES

### Membership List

|    | First Name | Last Name | Samford E-mail | Classification |
|----|------------|-----------|----------------|----------------|
| 1  |            |           |                |                |
| 2  |            |           |                |                |
| 3  |            |           |                |                |
| 4  |            |           |                |                |
| 5  |            |           |                |                |
| 6  |            |           |                |                |
| 7  |            |           |                |                |
| 8  |            |           |                |                |
| 9  |            |           |                |                |
| 10 |            |           |                |                |
| 11 |            |           |                |                |
| 12 |            |           |                |                |
| 13 |            |           |                |                |
| 14 |            |           |                |                |
| 15 |            |           |                |                |
| 16 |            |           |                |                |
| 17 |            |           |                |                |
| 18 |            |           |                |                |
| 19 |            |           |                |                |
| 20 |            |           |                |                |
| 21 |            |           |                |                |
| 22 |            |           |                |                |

## APPENDIX: ORGANIZATION RESOURCES

### Agency Fund Account Request

This form is for the Office of Accounting & Financial Services records only. The Vice President for Business Affairs must approve all account requests. Only Samford University employees may be given access to BANNER; therefore, your organization's advisor will be responsible for completing any BANNER forms.

Name of Organization:

Web Site Address:

Brief Explanation:

Source of Funds:

Dues:

Other (Specify):

Name of Account:

General Ledger Account Number:

Use of Funds:

Approval for Disbursements: (Please Sign)

---

Faculty/Staff Advisor Date

---

Amy Simpson, *Director of Student Leadership and Involvement* Date

---

Phil Kimrey, *Vice President for Student Affairs and Enrollment Management* Date

---

Harry B. Brock, III, *Vice President for Business Affairs* Date

## APPENDIX: ORGANIZATION RESOURCES

### Sample Constitution/By-Laws

This sample constitution is not designed for you to fill in the blanks but rather to provide you with guidelines in designing a constitution that will meet the specific requirements of your organization.

**Statements in Article III, Sec. 3 and Article VII, Sec. 2 are required for every organization.**

#### Article I. NAME

The name of the organization shall be \_\_\_\_\_ of Samford University.

#### Article II. PURPOSE

The purpose of the organization shall be

Section 1.

Section 2.

Section 3.

#### Article III. MEMBERSHIP

Section 1. Membership shall be open to

Section 2. No member may be removed from membership without first having an open hearing and then by no less than a \_\_\_\_\_ vote at a regular meeting.

Section 3. (Insert organization's name) complies with Samford University's policy prohibiting discrimination in its educational and employment policies and does not unlawfully discriminate on the basis of race, color, sex, age, disability, veteran status, genetic information, or national or ethnic origin.

#### Article IV. OFFICERS

Section 1. The officers of this organization shall be \_\_\_\_\_ (Include a list of the positions, not the persons who will fill those positions. Example: President, Vice President, Secretary/Treasurer).

Section 2. All officers shall be elected at the \_\_\_\_\_ meeting (August meeting, last

## APPENDIX: ORGANIZATION RESOURCES

meeting, etc.) of \_\_\_\_\_ (fall/spring – we suggest spring) semester of each year. Officers will be elected by \_\_\_\_\_ (majority, 2/3 present) of those members present at meeting.

Section 3. No officer may be removed from office without first having an open hearing and then by no less than a \_\_\_\_\_ vote at a regular meeting.

Section 4. Office vacancies will be filled by special election at the meeting after the vacancy occurs.

### Article V. MEETINGS

Section 1. Regular meetings will be held \_\_\_\_\_ (Use specific time if such time will not change from year to year or semester to semester. Otherwise, use less specific time such as “The first Monday of each month” or “At a time agreed upon by the majority of the members).

Section 2. Special meetings may be called by the chief executive officer or upon request of any \_\_\_\_ (number) active members. .

Section 3. All members shall be notified of a special meeting at least \_\_\_\_ (number of days) before the time of the special meeting.

### Article VI. QUORUM

Section 1. Proposed amendments to this constitution or the by-laws of this constitution shall be presented at a regular meeting at least one meeting prior to being discussed and voted upon.

Section 2. Having been properly presented, amendments may be adopted by a \_\_\_\_ majority vote of the membership at a regular meeting.

Section 3. Amendments shall go into effect \_\_\_\_\_ (immediately upon adoption, 30 days following adoption, etc.).

### Article VII. FINANCIAL OPERATIONS

Section 1. The dues shall be \_\_\_\_\_ (amount) payable by \_\_\_\_\_ (time).

Section 2. Should (insert organization’s name) go dormant or inactive, any remaining funding

## APPENDIX: ORGANIZATION RESOURCES

associated with the organization should be returned/distributed/transferred to:

(Suggested ways to disperse remaining funding include but are not limited to – return to corresponding national umbrella organization, divide equally among student organizations in the same category, provide to the Student Government Association or Graduate School for student organization funding requests, transfer to an existing student scholarship fund, donate to a non-profit of the organization’s choice).

### Article VIII. DUTIES OF OFFICERS

Section 1. Office of President (or related position)

Section 2. Office of Vice President (or related position)

Section 3. Office of Secretary

Section 4. Office of Treasurer

(Note: An officer must be assigned the responsibility to register through OrgSync each year. This responsibility may be assigned to any officer in your organization. Subsequent sections for other officer explanations as needed.)

### Article IX. COMMITTEES

Section 1. There shall be \_\_\_\_\_ standing committees.

Section 2. The \_\_\_\_\_ Committee shall \_\_\_\_\_  
\_\_\_\_\_

(These sections- and subsequent sections as needed- should describe the creation, purpose, and duties of the standing committees).

Section 3. Special committees may be \_\_\_\_\_ (Describe the creation, purpose, and duties of special committees).

## **APPENDIX: ORGANIZATION RESOURCES**

### Article X. PARLIMENTARY AUTHORITY

Robert's Rules of Order shall be the parliamentary authority of this organization.



## APPENDIX: ORGANIZATION RESOURCES

### Effective Officer Transition

When organizations spend too little time transitioning, it causes new officers to spend too much time acclimating and learning the ins and outs of being a successful student organization at Samford.

Poor transitions result in a continuous cycle of lost momentum; effective transitions set up the organization and its officers for success.

### Benefits of a successful transition:

- New officers can capitalize on the knowledge and experience of outgoing officers
- Minimize confusion of leadership changeover
- Provide outgoing officers with closure
- Formal process for transfer of knowledge
- Allows for a period of learning/partnership between new officers and old officers – build confidence of new officers
- Minimize loss of momentum of the organization as a whole
- Ensure strategic and effective fiscal planning

### What to do – outgoing officers:

- Coordinate new officer selection (refer to constitution)
- Once officers are selected, renew organization in Bulldog Central and update officer information on all other relevant documents or websites (give access to social media accounts!)
- Ensure space is reserved for upcoming events
- Schedule a transition meeting between outgoing and incoming officers to share information as a group
- Allow incoming officers a period of time to shadow outgoing officers
- Ensure incoming officers participate in student org training and appropriate officer completes SGA funding training
- Compile all resources in a folder (with admin access only) in the organization's Bulldog Central portal, so documents are saved digitally for future transitions. You may also create a physical transition binder, if you find this helpful.

### Useful transition documents

- Organizational mission and goals
- Organizational constitution and by-laws
- Position description
- Necessary meetings attended/conducted
- Important tasks
- Collaborative duties
- Financial/budget information
- Position goals
- Positional year-end report
- Organizational calendar
- Important contacts/resources
- Relevant correspondence from past year
- Do's and don'ts/lessons learned
- Contact info for outgoing officers
- Develop an action plan and timeline for new officer transition

## **Effective Officer Transition**

### **What to do – incoming officers:**

- Be proactive in seeking advice from outgoing officers
- Be actively engaged in the transition process
- Expect change to be accepted gradually
- Let group members have a say in what happens
- Be sure your group has a common purpose
- Encourage brainstorming and creativity
- Manage conflict
- Complete student organization trainings and SGA funding sessions
- Renew student organization in Bulldog Central, if necessary

### **What to do – advisors:**

- Facilitate conversations about officer transition
- Encourage organization to consider holding officer elections mid-spring semester
- Regardless of transition time, communicate the how and why of officer transition
- Make sure incoming officers are aware of deadlines (i.e. organization renewal)
- Encourage new officers to take an active role in budget planning
- Encourage officer shadowing
  - If transitions take place beginning/middle of the spring semester, new officers can shadow outgoing officers to gain a better understanding of the role
- Work with outgoing officers
  - Provide them with the tools and knowledge to lead a successful officer transition
- Meet with outgoing officers and incoming officers
  - Recognize the accomplishments of the outgoing officers; offer support to the incoming officers, help them think strategically and plan early

**If transitioning advisors, ensure that responsibility for related organization agency account(s) is transferred.**

## Effective Officer Transition

### Model Transition Meeting Agenda

A transition meeting can offer formal change, continuity, and growth for the organization while allowing new officers to learn from the outgoing officers. The meeting should be casual and open so the organization can benefit from an honest dialogue of the accomplishments and challenges of the year.

- Year in Review
  - Goals
  - Programs and Activities
  - Membership
  - Officers and Organizational Structure
  - Organization Operations
  - Advisor Involvement
  - Public Image
- Legacy to New Officer Team
  - Current strengths and weaknesses
  - Advice to successors
  - Major challenges and accomplishments
- Officer Transition (incoming and outgoing officers meet 1:1)
  - Review transition folder (Bulldog Central), if applicable
  - Talk about any unfinished projects
  - Mistakes that could have been avoided
  - Advice specific to new officer
- Transition Ceremony
  - Semi-official passing of the gavel/socializing

## Sample Meeting Agenda

### Team Meeting

**Date:**

**Place:**

- I. Reading and approval of minutes  
Important things happened in your previous meeting. Before you do anything else, make sure that everyone agrees with the record of that meeting.
- II. Reports of officers, boards, and standing committees  
Your leadership team should be working in the time between membership meetings, and you need to hear what they've been up to before you venture into making too many decisions.
- III. Reports of special committees  
If your group has appointed any special committees for specific purposes, you need their info, too. But these committees wait their turn and report after the standing committees make their reports.
- IV. Special orders  
Sometimes you need to schedule particular items of business before going over the things postponed from a previous meeting. And sometimes the bylaws require something to be done at a particular meeting, like a "nominations in December" rule in your bylaws. Such items of business and bylaw requirements qualify as special orders.
- V. Unfinished business and general orders  
Before you do anything else, you need to finish up what you already started. This is the time to get back to the postponed motions and any business that was pending when your previous meeting adjourned.
- VI. New business  
If time permits, you can broach the subject of new business. You've done the wise thing by waiting until you've taken a shot at all the other stuff. It's sort of like how you have to clean your plate before you get dessert.

Retrieved from: C. Alan Jennings, PRP from Robert's Rules For Dummies, 2nd Edition

## Sample Meeting Minutes

**The Minutes.** The record of the proceedings of a deliberative assembly is usually called the Minutes, or the Record, or the Journal. The essentials of the record are as follows:

- I. The kind of meeting, "regular" (or stated) or "special," or "adjourned regular" or "adjourned special"
- II. Name of the assembly
- III. Date of meeting and place, when it is not always the same
- IV. The fact of the presence of the regular chairman and secretary, or in their absence the names of their substitutes
- V. Whether the minutes of the previous meeting were approved, or their reading dispensed with, the dates of the meetings being given when it is customary to occasionally transact business at other than the regular business meetings
- VI. All the main motions (except such as were withdrawn) and points of order and appeals, whether sustained or lost, and all other motions that were not lost or withdrawn
- VII. And usually the hours of meeting and adjournment, when the meeting is solely for business. Generally, the name is recorded of the member who introduced a main motion, but not of the seconder.

Retrieved from: Robert's Rules of Order Newly Revised (11th ed.), Art. X. The Officers and the Minutes.

## Sample Goal Worksheet

Name \_\_\_\_\_ Position \_\_\_\_\_

**\*\*REMEMBER:** Goals should be S.M.A.R.T. (specific, measurable, attainable, realistic, and time-targeted)\*\*

### MY GOALS FOR 2020-2021

| Goal | How will you know you have achieved this goal? | When do you plan to achieve this goal? |
|------|------------------------------------------------|----------------------------------------|
|      |                                                |                                        |
|      |                                                |                                        |
|      |                                                |                                        |
|      |                                                |                                        |
|      |                                                |                                        |
|      |                                                |                                        |
|      |                                                |                                        |
|      |                                                |                                        |
|      |                                                |                                        |

## **Sample Goal Worksheet (Cont.)**

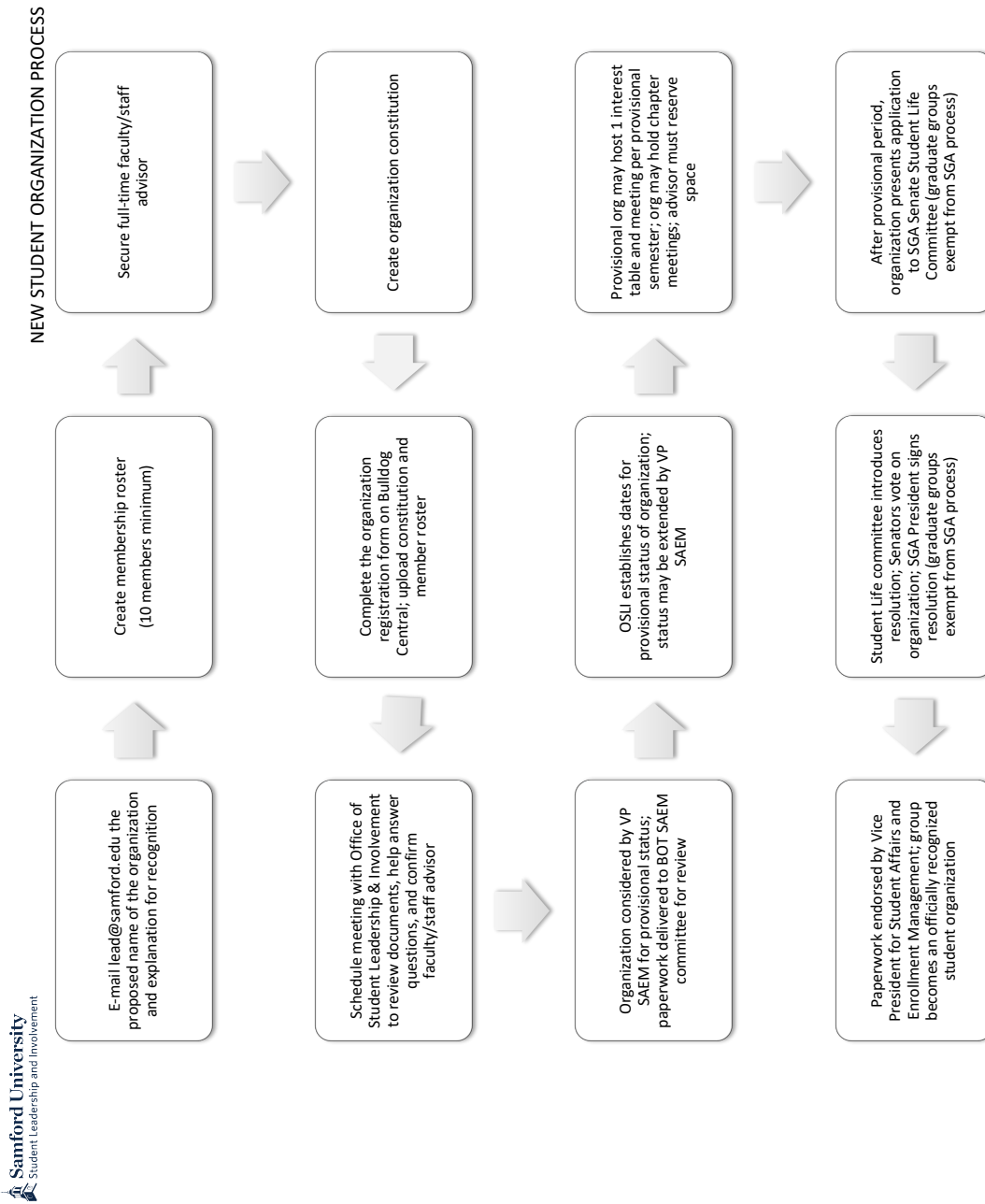
**What challenges/obstacles do you think you may encounter when trying to reach your goals?**

**What can you do to avoid/overcome these obstacles?**

**What can your advisor do to help you reach your goals?**

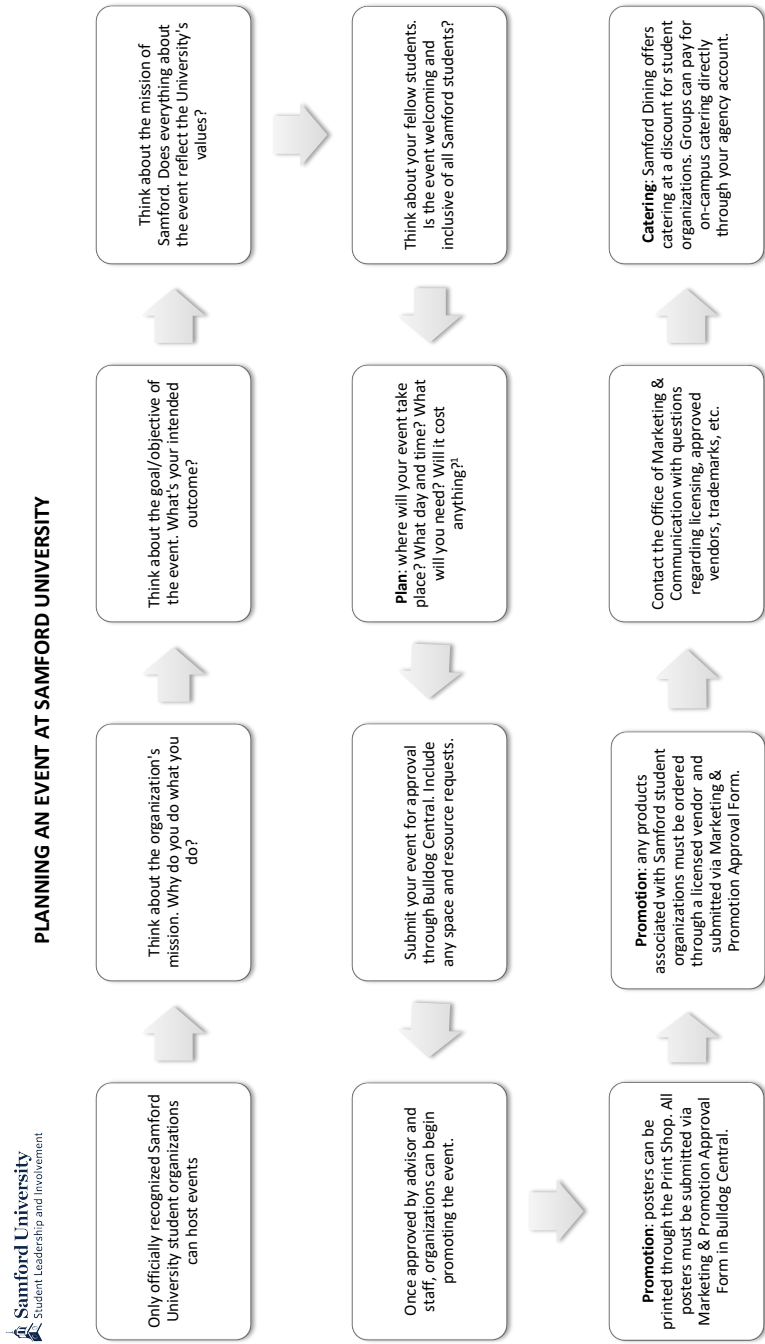
**In what areas would you like to grow and develop this year?**

# New Student Organization Flowchart





# Event Planning Flowchart



**Note:** Organizations that receive SGA funding for their event cannot charge a fee for Samford students to attend  
[Licensed Vendor List](http://www.samford.edu/departments/files/Marketing/Licensed-Vendor-List.pdf) - [www.samford.edu/departments/files/Marketing/Licensed-Vendor-List.pdf](http://www.samford.edu/departments/files/Marketing/Licensed-Vendor-List.pdf)  
[Office of Marketing & Communication](http://www.samford.edu/departments/marketing) - [www.samford.edu/departments/marketing](http://www.samford.edu/departments/marketing)  
[Flavours Catering by Sodexo](http://www.samford.edu/departments/marketing) - [samford.catertrax.com](http://www.samford.edu/departments/marketing)

## Event Planning Timeline

4 months out

- **BRAINSTORMING**

- Think about: Organization Mission, Goal of Event, Samford's Mission, Fellow Students

3 months out

- **LOGISTICS**

- ***Submit your event for approval***

- Log into your organization's Bulldog Central portal
- Under the Forms tab, select the Event Registration Form
- Fill out the form completely - your advisor must reserve space for your event
- Be descriptive! Your event may not be approved if you do not include details

- **PROMOTION**

- How will you get the word out? Are you promoting to all students or just your group?
- Brainstorm design for t-shirts or any social media graphics
- If you would like to sell t-shirts, tickets, or otherwise promote through tabling, you need to create a separate event request to reserve tables (follow Bulldog Central process)

2 months out

- **LOGISTICS**

- ***Make sure your event has been approved!***

- **PROMOTION**

- If you are ordering t-shirts or other promotional items, create design and submit design ideas to a Samford licensed vendor -  
<http://www.samford.edu/departments/files/Marketing/Licensed-Vendor-List.pdf>

- **CATERING**

- Think through: How many people do you need to feed? How much can you spend?
- If you would like to have the event catered, you have two options:
  - Contact Samford Dining. Student organizations get discounts and can pay directly out of their agency account. - <https://samford.catertrax.com/>
  - Arrange catering with an outside vendor. Students often pay out of pocket and then get reimbursed.

6 weeks out

- **PROMOTION**

- Submit proofs of any promotional materials using the Marketing and Promotion Approval Form: <https://samford.presence.io/form/marketing-and-promotion-approval-form>. An authorized employee from Student Leadership and Involvement and/or Greek Life will provide email notice that artwork has been reviewed and approved by the student organization advisor. A sample of the artwork will be sent to Marketing and Communication.
- Posters can be printed through the Print Shop using the organization's agency account

**1 month out**

**•LOGISTICS**

- Is your space reserved? Did you reserve all the resources you will need? You can make event edits in Bulldog Central

**•PROMOTION**

- Tabling: Designate who will be in charge of tabling. How will you coordinate who works the tables? If you are selling anything, how will you collect money?

**•CATERING**

- Place catering order - make sure you order everything you need, including utensils, napkins, drinks, etc.)

**2 weeks out**

**PROMOTION**

Tabling: Make sure you have all the necessary supplies. Do you need a plastic tablecover? The Office of Student Leadership & Involvement has tablecovers available for use.

Campus Connection: If you would like your event in the Campus Connection, submit info to [lead@samford.edu](mailto:lead@samford.edu) by Thursday at noon, 1-2 weeks before your event.

Hang posters/flyers in approved areas on campus. Policies for poster locations, chalking, etc. can be found in the Student Handbook - <http://www.samford.edu/files/Student-Handbook.pdf>

**1 week out**

**•LOGISTICS**

- Do you have all the necessary resources reserved? Do you need to make any modifications? Check in OrgSync.

**•PROMOTION**

- Tabling: Table throughout the week! (If applicable)
- Utilize your social media accounts! Announce the event via Twitter, Instagram, Facebook, etc. Keep using them throughout the week to get people excited.

**1 day out**

**•LOGISTICS**

- Double-check all of your reservations (space, resources, etc.) to make sure you're ready.

**•PROMOTION**

- Tomorrow's the day! Remind people of the details via social media. What should they bring? Do they need to wear anything specific? Is there a cost?

**•CATERING**

- If using an outside caterer, call caterer to ensure order will be ready.