

Westminster College Student Organization Advisor Guide



Studies have shown that being involved in meaningful activities while in college is a significant indicator for success in college.

*Westminster College
Office of Student Affairs
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New Wilmington, PA 16172*

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Introduction

As an advisor for a student organization at Westminster College, you have the unique opportunity to interact with Westminster students in a co-curricular context. Each advisor will perceive their role within a student organization differently. Some will be active within their organization, attending events and meetings, while some will remain more distant. However, there are certain roles that each advisor must fill, which are explained throughout this guide.

Co-curricular involvement in student organizations is a vital part of the overall collegiate experience. It provides students the opportunity to apply what they are learning inside the classroom to their lives outside of class, and carry that knowledge and experience after they leave Mother Fair. The concept of true learning integrates personal development with academic learning, thereby creating more diverse and knowledgeable students, and bridging the gap between academic learning and student affairs¹. Co-curricular involvement enhances student learning along with their cognitive, ethical, moral, and psychosocial development². This involvement through student activities prepares students for personal and professional success beyond graduation. Westminster College encourages and applauds our students in their involvement on campus and engagement in the community, and student organizations provide an important avenue to engage in this co-curricular experience.

¹R.P Keeling, Learning Reconsidered: A Campus-Wide Focus On The Student Experience? (Washington, DC: National Association of Student Personnel Administrators, 2004) quoted in Kathy Collins and Darby Roberts, Learning Is Not a Sprint: Assessing and Documenting Student Leader Learning in Cocurricular Involvement (Washington, DC: National Association of Student Personnel Administrators, 2012) 18-19..

²Kuh, George. (2009, November/December). What Student Affairs Professionals Need to know about Student Engagement. *Journal of College Student Development*, Volume 50, Number 6

What Makes A Good Advisor?

Provide Continuity – The nature of a college is there is turnaround; every fall a new class comes in and every spring a class leaves us. Student organizations see campus leaders enter and exit, each making their mark through their tenure in the group. However, an advisor typically stays with an organization. They provide continuity and help ease the transition of new officers each year, which helps ensure the success and longevity of an organization.

Maintain Records and Information – Advisors keep the historical records of an organization, as they are a constant in the life of a group. As an advisor, you should also maintain organizational information, whether in a binder or in a folder online (example- Google Docs). This will benefit you, as well as facilitate a greater ease with transitions in officers throughout the years.

Serve as a Mentor – An advisor is not the leader of an organization; however, they are a mentor and guide. Officers need support and will come to you to receive that assistance. Familiarizing yourself with policies and the organization itself will allow you to provide the guidance they need.

Be Familiar with Organization Policy – An advisor must be familiar with the bylaws and constitution of an organization. This allows you to assist and guide the officers and organization as a whole in living by the purposes and principals outlined at its founding.

Be Knowledgeable about College Practice – Advisors must be familiar with the practices and procedures of Westminster College itself. This handbook will be a resource to answer the questions you have regarding college policies.

Be Committed to Student Learning – Advisors should facilitate student learning within the organization and encourage student buy-in so that the learning process can be a shared responsibility².

Advisors are also encouraged to...

- Facilitate an annual review of the organization's constitution and by-laws.
- Clarify their role as advisor to the group members.
- Facilitate a group goal-setting exercise in which the organization determines what they need to accomplish and how they plan to do that.
- Facilitate a budget planning session in preparation for SGA allocation meetings.
- Be available to the officers of the organization for consultation.
- Assist the officers in understanding their duties and organizing programs.
- Attend meetings as needed and when possible.
- Facilitate an effective transition meeting or retreat when officers change.

² King, K. (2012). Student organization advisors and student employee supervisors: Who is responsible for the process? In K.M. Collins & D.M. Roberts (Eds.), *Learning is not a sprint: Assessing and documenting student leader learning in cocurricular involvement* (pp. 103 – 128). Washington, DC: NASPA.

Campus Resources for Advisors

Jason Rigsbee, Associate Dean of Students for Student Experience

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Student Experience Council (SEC)

Student Experience Council is charged with administration of the recognition and review processes. It reviews and makes recommendations on policies pertaining to student life (student activities and organizations, Student Government Association, fraternities and sororities, orientation, and residence life) and intercollegiate and intramural athletics. The Committee evaluates applications from student organizations seeking official College recognition and conducts periodic review of existing student organizations.

Once every five (5) years each student organization is reviewed by the SEC to determine if the organization is functioning according to its constitution and/or by-laws and upholding the philosophy, purposes and goals of the organization and College. SEC will review an organization's completed Assessment Report. A representative of the organization will be responsible for meeting with SEC to discuss the report.

The Council also advises and makes recommendations to the Vice-President of Students Affairs/Dean of Students on matters pertaining to student life. On matters pertaining to intercollegiate and intramural athletics, the Council advises and makes recommendations to the Director of Athletics.

Print Shop

Student Organizations may use Duplicating Services. They will use the same web form as college offices use, however you must ensure there are organization funds available.

My Westminster

Begin at Community > Campus Groups > Student Affairs > Student Organizations

From here you can find a wealth of information you will need as an advisor:

- The list of all student organizations
- Links to all the Student Organization Forms
 - Monthly Report Form
 - Annual Report Form
- Event Planning Resources
- List of all student organization officers

Figure 1.

The screenshot displays the Westminster College website's 'Student Organizations' page. At the top, a dark blue navigation bar contains links for HOME, ACADEMICS, ADMISSIONS, ALUMNI AND FRIENDS, COMMUNITY, FINANCES, EMPLOYEE, REPORTS, HELP, and MY PAGES. Below this, a breadcrumb trail reads 'Community > Campus Groups > Student Affairs > Student Organizations'. A left-hand sidebar menu lists various navigation options, with 'Student Organizations' selected. The main content area is titled 'Student Organizations' and includes sections for 'Student Organization Policies', 'Student Organization Resources' (with links to engagement guidelines, treasurer's guide, and advisor guide), 'Student Organization Forms' (with links to monthly and annual report forms and explanatory text), and 'Prospective Organizations'. A right-hand sidebar contains three sections: 'On-Demand Reports' (with a link to the officers report), 'PDF Reports' (with a link to the officers report and a notification icon), and 'Student Travel Forms' (with a warning that forms must be completed for overnight trips and links to risk management and waiver forms).

NOTE: You must update student organization officers and advisors when they change. This information is used in many ways by the College.

To update student organization officers and advisors, go to the “Update Student Organization Officers” tab and enter the relevant information.

Figure 2.

The figure consists of two side-by-side screenshots of a web portal. The left screenshot shows a page with the following content:

- Prospective Organizations**: How to start a new organization and resources to do so:
 - [Steps To Start A New Organization \(PDF\)](#)
 - [Template Constitution \(PDF\)](#)
- Event Planning**:
 - [Campus Event Registration Form](#)

Student Organizations must have their events approved via the Event Registration form. We ask that they be completed within 5 business days of your event. 10 business days prior to event is expected for large-scale campus events. If you have questions in the meantime, feel free to reach out to the Area Coordinator of Student Engagement, Melissa Reabe at reabemt@westminster.edu
- Berlin Lounge Technology Request Form**:

If you have Berlin Lounge reserved for an upcoming event, please fill out the following form with your technology needs for your event. Once your request is received, our Club Room Manager will reach out to you with confirmation and follow-up. We ask that this request is filled out at least 10 business days prior to your event. If you have any questions in the meantime, feel free to reach out to the Assistant Dean of Student Affairs, Francesca Manilla at [redacted]

The right screenshot shows a navigation menu with the following content:

- Student Affairs > On Demand Reports & Forms
- Student Organization Membership**
 - [Collapse all sets](#)
 - Ungrouped
 - Update Student Organization Membership** (highlighted with a red box)
 - VISIT
- Student Affairs > On Demand Reports & Forms
- Student Travel Policy**
 - Ungrouped
 - WC Travel Policy for Student Groups and Organizations

Microsoft TEAMS

Every organization has a Microsoft TEAMS group which can be accessed via clicking on the organization’s name on the list

This page is run by the organization. It can be used to:

- House by-laws
- Post rules and policies of the organization
- Post minutes of the meetings
- Showcase national bylaws (for national organizations)

It also houses the following Student Organization Information:

- Student Organization Monthly Report
- Campus Event Registration
- Campus Event Evaluation

Student Organization Requirements

To retain recognition and active status, a student organization must:

- Complete the **Student Organization Annual Report** form.
- Retain an advisor approved by the College.
- Maintain digital copies of a current (national, if applicable) constitution and/or by-laws in the Student Affairs Office.
- Submit to the Student Affairs Office any revised constitution or by-laws of the organization.
- Uphold the purposes and goals under which the organization was granted recognition and the purposes and goals of the College.
- Maintain at least five (5) current members. (Honor Societies may maintain recognition with less than five members). If an organization fails to maintain at least five current members for a period of one calendar year, it will be considered to be inactive.
- Be financially responsible: successfully pass the SGA annual audit and remain debt free.
- Successfully complete the organization self-assessment review process every five (5) years through SEC.
- Abide by the policies of Westminster College

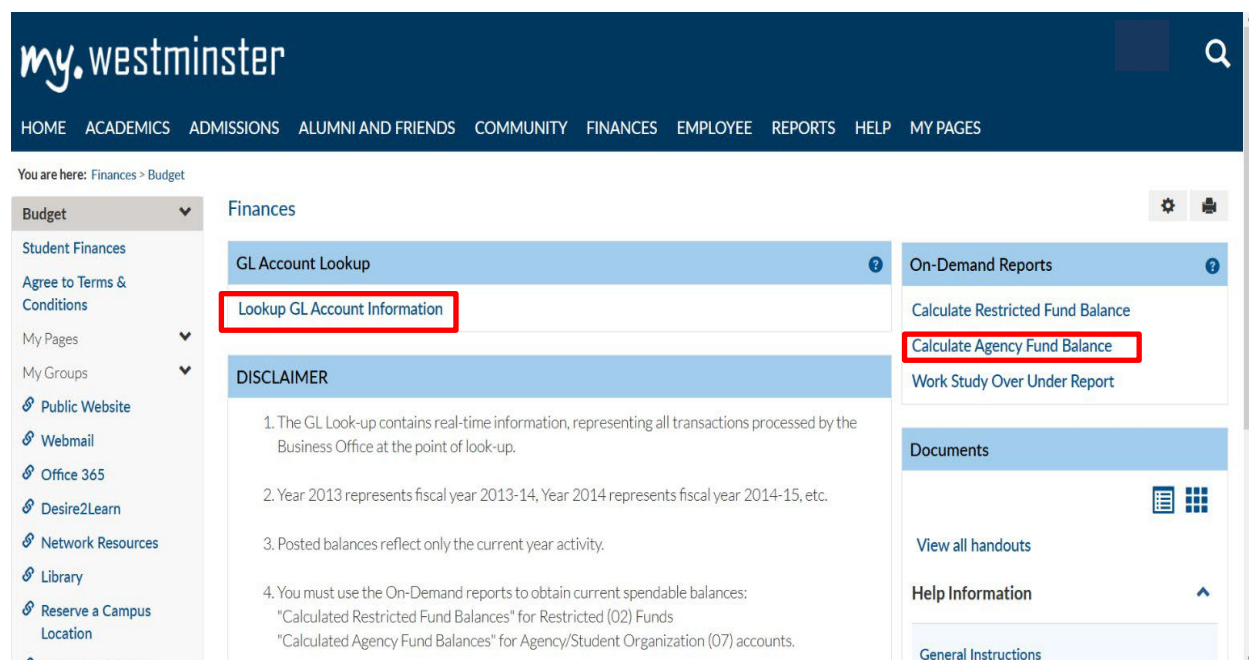
Finances

Another responsibility of an advisor is to ensure the organization is in good financial health. You must be attentive. You must be aware of the financial state of your organization.

You can interact with the finances of your organization in a few ways on My.Westminster.

1. GL Account Lookup (Registry of all transactions)
2. Calculate Agency Fund Balance (Find the true account balance)

Figure 3.



Every organization on campus has an Agency Fund through the college.

- This fund operates differently than restricted or college operation funds.
- An organization may **NOT** have a bank account off campus.
- Every organization has an account number that will be used for transactions with the Business Office. You must have this number.

ACCOUNT NUMBER should be passed down from one advisor to the next. In the event that you do not have this information contact the Business or Student Affairs Office. You must be the organization's advisor, President, or Treasurer on record to interact with the account.

GL Account Look Up (Check Registry)

This report will show the organizations transactions.

Begin at My.Westminster > Finances > GL Account Lookup

Fill in everything with a red box (i.e. Fund and Department)

Figure 4.

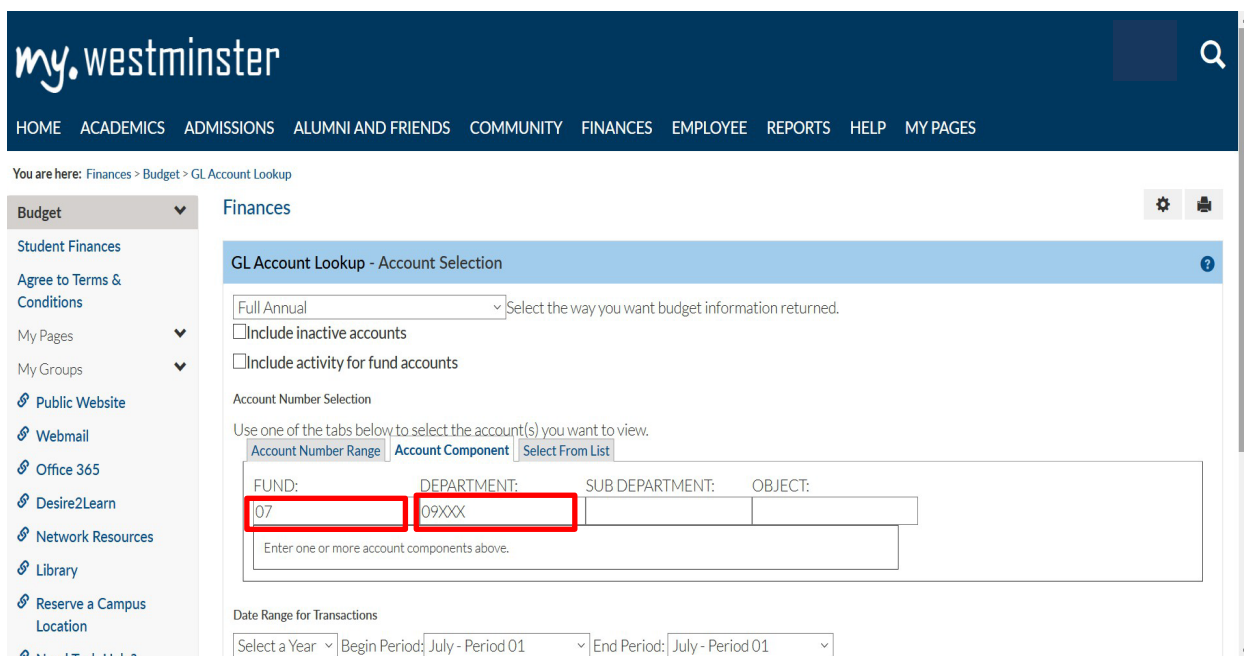


Figure 5.

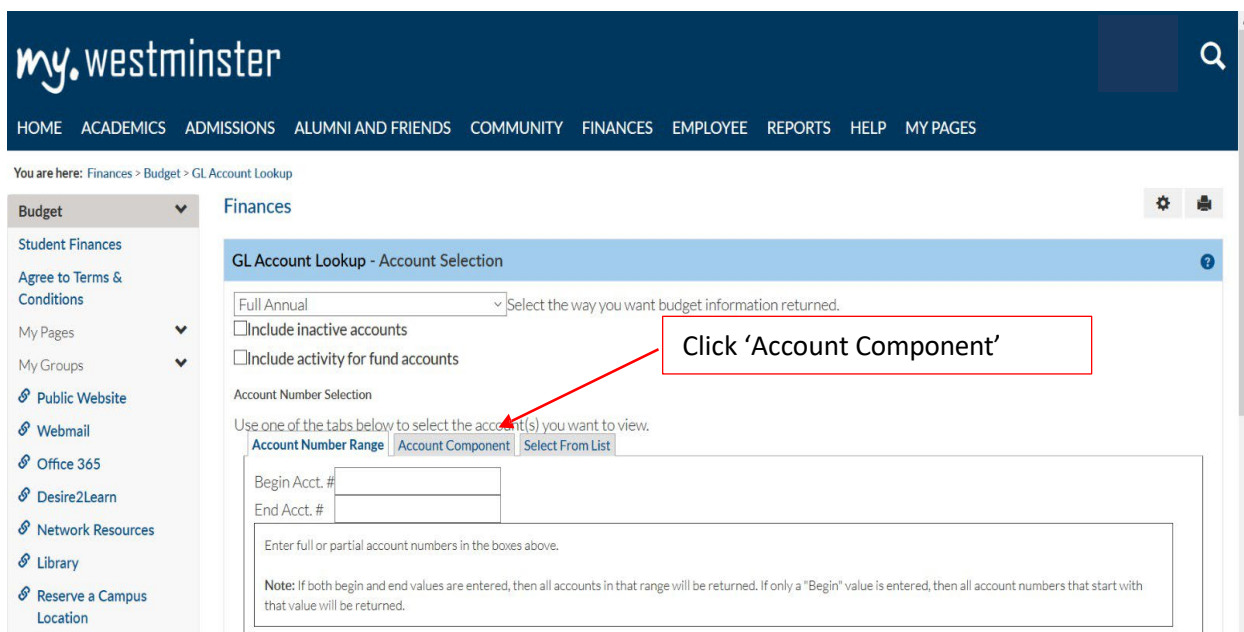


Figure 6.

my.westminster

HOME ACADEMICS ADMISSIONS ALUMNI AND FRIENDS COMMUNITY FINANCES EMPLOYEE REPORTS HELP MY PAGES

You are here: Finances > Budget > GL Account Lookup

Budget Finances

GL Account Lookup - Account Summary

7/1/2015 Thru 6/30/2016

Account Number	Description	Beginning Balance	Unposted Balance	Posted Balance	Encumbrance	Ending Balance	Other Accounts Against Budget	Total Annual Budget	Over/Under Budget
	SGA - Stu Gov't/Fund Balance	(\$48,573.43)	\$0.00	(\$7,719.64)	\$0.00	(\$56,293.07)	\$0.00	\$0.00	\$56,293.07
Totals:		(\$48,573.43)	\$0.00	(\$7,719.64)	\$0.00	(\$56,293.07)	\$0.00	\$0.00	\$56,293.07

To view the details transactions, click on the number in the Ending Balance column and the detail will open up.

Figure 7.

my.westminster

HOME ACADEMICS ADMISSIONS ALUMNI AND FRIENDS COMMUNITY FINANCES EMPLOYEE REPORTS HELP MY PAGES

You are here: Finances > Budget > GL Account Lookup

Budget Finances

GL Account Lookup - Transaction Detail

Account Number

Account Description SGA - Stu Gov't/Fund Balance

Beginning Posted Balance (\$48,573.43)

Ending Balance (\$56,293.07)

7/1/2015 Thru 6/30/2016

GL Account Number	Source Code	Group Number	Line Number	Date	Description	Amount	Status	Other Transaction Information
	IV	6029	7	07/02/2015	SGA/balance due	1950.00	Posted	View
	IV	6077	10	07/31/2015	SGA/MO 27398	397.43	Posted	View
	IV	6103	10	08/13/2015	SGA/acct#2003-6091-5 Apr&May papers	405.00	Posted	View
	IV	6135	4	08/27/2015	SGA/shirts for incoming class	2137.50	Posted	View
	IV	6150	16	09/03/2015	SGA/inv#4394 first year meeting	132.00	Posted	View
	IV	6167	34	09/10/2015	SGA/Lady Caress deposit	255.00	Posted	View
	IV	6167	37	09/10/2015	SGA/Backpack Program	2954.97	Posted	View
	IV	6167	40	09/10/2015	SGA/buses for Pirates game 9/11	600.00	Posted	View
	JL	3550	42	09/15/2015	SGA Allocation 2015-16	51900.00	Posted	View
	IV	6184	46	09/15/2015	SGA/cupcakes for Constitution Day	180.00	Posted	View

Agency Fund Balance

This report accounts for roll over from previous years and provides the current, correct balance. Only advisors have access to Calculate the Agency Fund Balance.

To run the Agency Fund Balance report:

- Input account number without “07”
- Click Generate Report

Figure 8.

The screenshot shows the 'my.westminster' website interface. The top navigation bar includes links for HOME, ACADEMICS, ADMISSIONS, ALUMNI AND FRIENDS, COMMUNITY, FINANCES, EMPLOYEE, REPORTS, HELP, and MY PAGES. The breadcrumb trail indicates the user is in 'Finances > Budget > On-Demand Reports'. The main content area is titled 'On-Demand Reports - Report Parameters' and contains a form with the following elements:

- A header instruction: "Enter or select values for each parameter then click submit. Every parameter is required."
- A text input field for "Department Account Number" containing the value "09XXX".
- Input instructions: "Input only the department number of the restricted fund balance you desire to view. The department number is the five-digit code following the fund number:"
- A pattern example: "xx-xxxxx-xxx-xxxxx"
- A label: "fund-department-subdepartment-object"
- Two buttons: "Generate Report" and "Cancel".

How Organizations Receive Funds

- Collect dues from members, if your constitution states this.
- Request money from SGA
- Fundraise

ALL funds must be deposited in the organization’s Agency Fund.

A note about fundraising

While fundraising is one way for organizations to increase funds, it has proven less effective in recent years. Organizations are encouraged to utilize funding provided to them by SGA. This statement does not refer to philanthropic funding.

Requesting Fund from SGA

SGA sets aside a significant portion of its budget to assist student organizations with programming and other initiatives. SGA publishes annually policies for how SGA funds can be spent. Generally speaking, SGA money should be used to foster all-campus programming and to provide a base level of administrative support for organizations.

To secure SGA funding, the organization must participate in the Audits and Allocations process. Funds requested in the beginning of the semester apply to the current fiscal year (July 1 to June 30).

Audit

This is a review of all the financial activity over the last year (i.e. all activity following the last audit and allocation process)

- Audits dates are announced by the SGA Finance Chair each year. Each organization will sign up for a 15-minute time slot.
- Prior to the audit, all dues, fundraisers, etc. must be deposited into the group's account at the Business Office.
- SGA Finance Committee will grade audits **pass** or **fail**.

If any organization fails for any reason, they will be placed on probation for one semester and all financial paperwork will require the approval of a designated individual within the Student Affairs Division.

Things required for the audit process:

- All receipts and copies of disbursement vouchers attached
- *There are two parts to the check, the check which is cashed and the description for the vendor which is removed before cashing. This vendor portion is NOT a receipt. It only tells the Finance Committee that you had the check written*
- All deposit slips
- Organization's current, accurate account balance

Allocations

This is the amount of money the organization would like to request from SGA for anticipated and planned expenses during the upcoming academic year. While the Audit looks at the past, the Allocations section looks at the future. The SGA Finance Committee will review each request and present a proposed allocation budget to the SGA Senate for approval. Representatives from organizations will be invited to attend the meeting where the proposal will come up for vote so they made advocate for their request.

Items required for allocation requests:

- ✓ Mandatory Template: Projected Budget for the next year (5 copies)

This template can be found by here: My.Westminster > Community > Student Government Association > Audits & Allocations (see number 1 below)

Figure 9.

SGA Funding

The full document can be found here: My.Westminster > Community > Student Government Association > Audits & Allocations (see number 2 above)

Check Requests

Check requests (Disbursement Vouchers- pictured below) are the forms used to spend money from the Agency Fund. The account number and signatures of the Treasurer and advisor are required. If you have an invoice number, include it. Do not ever sign a check request without seeing the receipt.

For student reimbursements, their home address is required when filling out the form. For vendors, if it is a new vendor the College has never paid before, a W9 form from the new vendor must accompany the request.

The white copy goes to the Business Office, the yellow and the receipt belong in the Treasurer's record, and the pink stays with the advisor.

Figure 10.

Westminster College, New Wilmington, PA 16172-0001
STUDENT'S GENERAL FUND - DISBURSEMENT

Organization's Name _____

To Payee _____ Date _____

Address _____ Account # _____

Invoice # _____ Office Use _____

Description of Expense: _____

Advisor _____ Treasurer of Organization _____

Business Office	White
Treasurer	Yellow
Advisor	Pink

BUSINESS OFFICE APPROVAL over \$500.00

For a new payee, attach a completed W9.

All vouchers must include an address before check will be issued.

Campus Event Planning

Registering Campus Events

All events hosted on or off campus by a recognized student organization must be registered with the Office of Student Affairs. Form [Campus Event Registration Form](#) is available at on My.Westminster or in an organization's TEAMS account. Campus Event Registrations should be submitted at least five business days before each event. Regular student organization meetings do not have to be registered.

Scheduling Campus Events

Student organizations or persons employed by the College who wish to reserve a room on campus for a College activity should first consult the master calendar of events available online (my.westminster.edu) via the College homepage. Consulting this master calendar will lessen the chance of scheduling events that conflict with others. You may submit your event to be listed on the "Online Events Calendar" by going to www.westminster.edu/promote.

Given the special heritage of Westminster College and its continuing affirmation of the relevance of this tradition to its life and work, the College should avoid scheduling any meetings during Chapel. The College will also seek to avoid any scheduling of events during the times reserved for Catholic Mass on Saturday evenings and Vespers on Sunday evenings.

Room reservations can be made online by clicking Reserve a Campus Location in the Quick Links box on My.Westminster.

Campus Event Evaluations

At the completion of each Registered Campus Event, the Office of Student Affairs requires student organizations to submit a [Campus Event Evaluation Form](#). The evaluation form is available on My.Westminster or in an organization's TEAMS account. The Evaluation Form is a short, five question online form to gather information regarding turnout of the event.

Student Organization Leadership Annual Retreat

At the beginning of each academic year, the Office of Student Affairs hosts the Student Organization Leadership Annual Retreat (SOLAR) on campus. Student organizations will be invited to attend the retreat if they are officially recognized or have registered as a prospective organization during the previous semester, have sufficient membership to maintain active status, and have elected officers. **To be eligible for funding through SGA**, organizations must send two officers/members to SOLAR.

Student Organization Reporting Forms

Student Organization Monthly Report

At the conclusion of each month, Student Organizations are expected to complete the Student Organization Monthly Report. This report is a way for the Office of Student Affairs to gauge and document what impact student organizations have each month. Student Organizations have the opportunity to share about organization meetings, officer meetings, programming debriefs, share wins, ask questions, and express concerns. The Student Organization Monthly Report can be found on My.Westminster as well as each Organization's TEAMS group.

Student Organization Annual Report

The Student Organization Annual Report is to be completed prior to the conclusion of each Spring Semester. The Annual Report form is a way for the Office of Student Affairs to know who the leadership for each organization will be going into the following academic year, to know when office transitions took place, and for organizations to share any changes made to their constitution. Student Organizations **must** complete the annual report each Spring Semester in order to remain active.

The Annual Report Form can be found by here: My.Westminster > Community > Campus Groups > Student Affairs > Student Organizations.

Transition and Vision

Most student leaders require great assistance with visioning and goal setting for their term in office. We encourage advisors to take an active role in this process. We also recommend that visioning and goal setting occur BEFORE completing the Audit & Allocation process with SGA. This will assist student leaders in making funding requests that match their goals.

- Ask your organization: “In a year, what do you want to do? What do you want to accomplish?”
- Look at these questions in a philosophical and practical way.

Additionally, student leaders require assistance and encouragement to effectively transition one group of leaders to the next. Our hope is that advisors will ensure this process happens and happens well.

- Challenge your leadership to make a transition binder/notebook/ technology (TEAMS) to help ease the transition between sets of officers.
- Try to facilitate time between the outgoing officers and incoming officers of your organization.
- Remind officers to provide updates to Student Affairs.
- Make sure keys, account numbers, passwords, etc. are passed from one generation to the next.

Conclusion

Co-curricular involvement is paramount to the learning process and the identity development of our students here at Westminster College. While each advisor acts differently in their role, you have still made a great and lasting decision by choosing to engage with the students in this unique and impactful way.

Thank you for engaging in this process with us and helping the College create an ideal learning environment that allows students to reach a level of epistemological learning¹. By assisting student leaders as an Organizational Advisor, you are assisting the students along their way to self-authorship and giving them a solid foundation based in the organizational framework, on which to grow.