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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.

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. We wish you and your student organization a productive and successful school year.

Sincerely,

The Office of Student Leadership & Involvement
The following departments offer resources to student organizations:

**Facilities Management**  
205-726-2711  
www.samford.edu/departments/facilities-management

**Spiritual Life**  
Burns Hall 200 Suites  
205-726-2825  
www.samford.edu/spiritual-life

**Marketing and Communication**  
Samford Hall 310  
www.samford.edu/departments/marketing

**Student Leadership and Involvement**  
Burns Hall 205 (temporary)  
205-726-2251  
www.samford.edu/leadership

**Residence Life**  
Cooney Field House, 3rd Floor (temporary)  
205-726-2956  
www.samford.edu/residence-life

**Student Services**  
Samford Hall 307  
205-726-2763  
www.samford.edu/students/services

**Samford Dining/Catering**  
Ralph W. Beeson University Center  
www.samford.edu/departments/dining  
Catering: https://samford.catertrax.com/

**University Services**  
Seibert, 3rd Floor (temporary)  
205-726-2752
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 Office of Student Leadership and Involvement will review materials submitted for a new organization and consult with its proposed officers and advisor. An organization’s petition for recognition is presented to the undergraduate Student Government Association Student Life Committee of Senate and the SGA Senate. Proposed graduate student organizations are not reviewed by the SGA. The University President and the Vice President for Student Affairs and Enrollment Management then determine if proposed organization is approved. If such 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

1. Formation and recognition of a student organization requires the following: At least ten (10) students must be charter members and be identified on a membership roster, including first name, last name, e-mail, and classification (sample membership list available in manual).
2. Read the student organization manual in its entirety to ensure that all University policies are being followed.
3. Enlist a full-time Samford University faculty or staff member to serve as advisor to the organization. Organizations may have more than one advisor.
4. Create a student organization constitution that is approved by a majority of the organization’s charter members (sample constitution available in manual).
5. Complete and submit the new student organization registration on OrgSync by selecting the Organizations tab, Register New Organization. Upload the member roster and organization constitution.
6. After the online submission is made, schedule a meeting with the Office of Student Leadership and Involvement. The president, treasurer, and advisor must attend this meeting. Other organization leaders are encouraged to attend. Here, the student
leaders will discuss the organization and receive guidance on the recognition process. The Office of Student Leadership and Involvement will review submitted information and may recommend revisions. Additional meetings may be requested by student leaders or required by the Office of Student Leadership and Involvement. Staff will ensure that the student organization is well-prepared before allowing the application to proceed.

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
- Club Sports: camprec@samford.edu

7. Once an organization has preliminary approval from the Office of Student Leadership and Involvement, it receives provisional status. As a provisional organization, the group may host one (1) interest meeting and one (1) interest table event per provisional semester. The organization may also conduct member meetings throughout the provisional term, however, the advisor will be responsible for reserving the space for these events.

8. Provisional undergraduate organizations then present to the SGA Senate Student Life Committee which may recommend the organization to SGA Senate, including a recommendation contingent upon certain revisions or additions to the application and formation documents as the committee deems appropriate. \textit{Graduate organizations are not required to comply with steps 8 and 9.}

9. The SGA Senate will vote to either approve or deny the application for recognition. If the vote is to approve the organization, its application will be sent to the Vice President for Student Affairs and Enrollment Management.

10. The Vice President for Student Affairs and Enrollment Management and the University President will then approve or deny the application.

11. Paperwork is submitted to the Samford Board of Trustees for endorsement. \textbf{Once the Board has granted approval, the organization is entitled to all privileges granted to recognized Samford University student organizations.}

12. \textbf{Optional:} Student organizations may apply for a University bank account by completing and turning in the agency account request form the Office of Student Leadership and Involvement. The agency account allows student organizations to have a University bank account to deposit/withdraw funds. The organization’s advisor is the responsible party for the account. Organizations must have an agency account to receive SGA Senate funding.

13. \textbf{Note:} Should questions arise regarding a new student organization, other campus stakeholders may be consulted, including the Faculty Campus Life committee and other relevant faculty, staff, and administrators.
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 OrgSync
- 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 OrgSync. 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 and purpose of the university, the organization will lose its university recognition.
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 OrgSync portal
3. If necessary, inform the advisor that he/she has been removed from his/her responsibilities as advisor to the organization
STUDENT ORGANIZATION MANAGEMENT

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

5. 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 up to $2,000/semester from SGA Senate. Senate Funding requests are made through OrgSync. 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. Please direct questions to sga@samford.edu.

Graduate Student Services – Event Funding
Graduate student organizations are eligible to submit a funding request to the Office of Student Services 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 OrgSync 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 OrgSync 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. 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.
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.

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 an approval form at https://orgsync.com/31757/forms/211226.
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.
Preamble
We as the Samford community affirm the value of a peaceful and purposeful community, founded on the moral and ethical integrity of students, staff and faculty. We commit ourselves to the Christian values on which Samford University was founded. We expect that our commitment to mutual responsibility and a spirit of cooperation will create a community that is orderly, caring, and just.

Our Values

Worth of the Individual: We value the intrinsic worth of every individual in the community. Our respect for other individuals includes an appreciation of cultural backgrounds different from our own, an understanding of different attitudes and opinions, and an awareness of the consequences of our actions on the broader community. Those values can be violated by behaviors such as harassment, hazing, sexual misconduct, assault, stalking, and relationship violence.

Self-Discipline: We value personal responsibility and recognize the individual’s need for physical, intellectual, spiritual, social and emotional wholeness. We value the full development of every student in terms of a confident and constructive self-image, of a commitment to self-discipline, and of a responsible self-expression. Gambling; disorderly conduct; possessing, consuming or distributing alcohol; intoxication; and possessing, using, and distributing illegal drugs are examples of behaviors that violate the value of self-discipline.

Integrity: We value a campus community that encourages personal growth and academic development in an atmosphere of positive Christian influence. We affirm the necessity of academic standards of conduct that allow students and faculty to live and study together. We value the fair and efficient administration of these standards of conduct. These values can be violated by academic dishonesty, fraud and dishonesty.

Respect for Property and the Environment: We value the rights and privileges of owning and using property, both personal and university, and the benefits of preservation and maintenance of property and of our natural resources. In our stewardship of property, we recognize the accountability of our actions to the future of the Samford University community. Stealing or being in the possession of stolen or lost property, vandalism, setting a fire and arson, tampering with fire and safety equipment, possessing firearms or weapons on campus, possessing or using fireworks on campus, unauthorized entry, stealing or unauthorized use or possession of money or other negotiable instruments, and smoking in undesignated smoking areas on campus are examples of behaviors that violate this value.
Respect for Community Authority: We value our privileges and responsibilities as members of the university community and as citizens of the community beyond the campus. We value the community standards of conduct expressed in our system of laws and value the fair administration of those laws, including university, municipal, state, and federal laws. These values are violated by aiding, abetting or conspiring to engage in values violations; violating residence hall visitation guidelines; reckless behaviors; lewd and indecent conduct; insubordination; unauthorized and/or unruly demonstrations; driving while impaired; habitually offending motor vehicle rules and regulations; creating a nuisance by talking, yelling, singing or playing a musical instrument, electronic device, etc., loudly enough to disturb members of the university community; committing a city, state, or federal crime and excessive parking citations.

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 OrgSync. 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 OrgSync 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 to set up a meeting, during which the organization’s status will be reviewed. Organizations must also submit an organization renewal on OrgSync 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:
# Membership List

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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

______________________________________________________________________________

Laura Breedlove, 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
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 (March 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 associated with the organization should be returned/distributed/transfered to:
APPENDIX: ORGANIZATION RESOURCES

(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).

Article X. PARLIAMENTARY AUTHORITY

Robert’s Rules of Order shall be the parliamentary authority of this organization.
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 on OrgSync 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 attends SGA funding info session
- Compile all resources in a folder (with admin access only) in the organization’s OrgSync 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
- Attend student organization trainings and SGA funding sessions
- Renew student organization on OrgSync, 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 (OrgSync)
  - 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.

# Sample Goal Worksheet

Name_______________________________________  Position____________________________________

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

## MY GOALS FOR 2018-2019

<table>
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<tr>
<th>Goal</th>
<th>How will you know you have achieved this goal?</th>
<th>When do you plan to achieve this goal?</th>
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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 PROCESS

Student Organization Interest Group (10 members minimum)

Read Student Org Manual

Find full-time faculty/staff advisor

Schedule meeting with Office of Student Leadership & Involvement* to review documents, help answer questions, and confirm faculty/staff advisor

Create organization constitution

Upload constitution and member roster on OrgSync

Must renew organization at the end of each semester (update officer information as needed)

May acquire agency account, schedule events on the SU calendar, reserve space on campus, and request SGA Senate funding

Present organization to SGA Senate Student Life Committee**; committee drafts resolution for SGA Senate (meets 1x/wk)

SGA Senate votes on organization; organization proceeds with Senate Resolution to Vice President for Student Affairs and Enrollment Management and University President for endorsement

Paperwork submitted to the Samford Board of Trustees for endorsement; group becomes an officially recognized student organization

Note:
*The Office of Spiritual Life reviews documents for all faith-based organizations and the Office of Campus Recreation reviews for club sports organizations
**Graduate student organizations not required to present to undergraduate student government
PLANNING AN EVENT AT SAMFORD UNIVERSITY

1. Think about the organization's mission. Why do you do what you do?
2. Think about the goal/objective of the event. What's your intended outcome?
3. Think about the mission of Samford. Does everything about the event reflect the University's values?
4. Think about your fellow students. Is the event welcoming and inclusive of all Samford students?

Once approved by advisor and staff, organizations can begin promoting the event.

Promotion: posters can be printed through the Print Shop. All posters must be submitted via Marketing & Promotion Approval Form.

Plan: where will your event take place? What day and time? What will you need? Will it cost anything?

Promotion: any products associated with Samford student organizations must be ordered through a licensed vendor and submitted via Marketing & Promotion Approval Form.

Contact the Office of Marketing & Communication with questions regarding licensing, approved vendors, trademarks, etc.

Catering: Samford Dining offers catering at a discount for student organizations. Groups can pay for on-campus catering directly through your agency account.

Note:
1. Organizations that receive SGA funding for their event cannot charge a fee for Samford students to attend
2. Marketing and Promotion Approval Form - orgsync.com/31757/forms/211226
4. Office of Marketing & Communication - www.samford.edu/departments/marketing
5. Flavours Catering by Sodexo - samford.catertrax.com
## 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 OrgSync portal
  - Under the “Events” tab, click the green “Create an Event” button
  - Fill out the form completely - reserve space for your event under “When and Where”
  - 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 OrgSync 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](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/](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: [orgsync.com/31757/forms/211226](https://orgsync.com/31757/forms/211226). An authorized employee from Student Leadership and Involvement and/or Greek Life will provide written 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
Event Planning Timeline

1 month out

• **LOGISTICS**
  • Is your space reserved? Did you reserve all the resources you will need? You can make event edits in OrgSync

• **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**
  • 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 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](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.