

COLORADO MESA UNIVERSITY

FALL 2019, SPRING 2020

# Advisor Manual



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## Contact Info

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## Advisor Role

### What is expected of the advisor?

Each Advisor role is distinct in and of itself and holds a multitude of responsibilities. Some advisors choose to play a very active role by attending meetings, working with student officers, and assisting in the event planning and development process. Others maintain a more distant relationship with the club. It is realized that each advisor will perceive his/her relationship to their student club differently, but hopefully regardless of the relationship, maintain some regular contact.

The biggest thing that Student Life tries to have is a student ran system. They are in charge and the faculty and staff are here to SUPPORT them. Faculty and staff, in this sense, should be taking a back seat approach. These are student clubs and should be ran as such.

An advisor should be accountable for being well informed about club activities and be responsible for advising its officers on the appropriateness and general merits of policies and activities. Advisors are NOT responsible for the actions or policies of student clubs; students are solely responsible.

### Questions to think about:

- How much involvement is expected and needed?
- How often does the group meet?
- How many major activities does the group want to have per semester?
- How experienced are the student leaders?
- What are some of the problem areas your organization needs advisory help with?
- In what ways could the advisor can be more helpful to the group?
- Will the advisor be a silent observer at meetings or an active participant?

## Club Definition

### Clubs

At CMU there are 2 different types of clubs, and below will illustrate the differences between them. The definitions and distinctions will also talk about what is required to start a club as well as the requirements of that club. These definitions have been pulled right from the constitution for CAB. For any further questions, please contact CAB directly.

### Recognized Club

1. Have a minimum of three CMU fee paying Students with no less than 9 credit hours per semester fulfilling the roles of :
  - a. President
  - b. Vice-President
  - c. Treasurer
2. All officers must maintain a cumulative 2.0 GPA during their term.
  - a. Officers failing to comply will be asked to step down by the CAB Director or Assistant Director.
3. A constitution containing the following articles
  - a. Name
  - b. The aims and objectives/purpose of club
  - c. Meeting frequency
  - d. Membership requirements
  - e. Provisions for the selection of officers and a means for impeachment
  - f. Responsibility of officers
  - g. Detailed provisions for the exercise of financial control
  - h. A section stating that membership is open to all students
  - i. Any Club affiliated with a national organization must present a letter of affiliation with their constitution.
  - j. In the event of constitution changes, an updated copy of the constitution must be submitted to CAB immediately.
4. A faculty or staff advisor must sign the club registration form that is submitted to CAB.
  - a. Faculty or staff advisors may advise no more than three clubs without permission from the CAB Director.
  - b. New Club Advisor must attend a full Advisor Training before a club will officially be recognized by CAB.
  - c. Returning Advisors must view a PowerPoint through OrgSync before club business can begin.
5. Recognized clubs are required to hold 2 fundraisers per semester and one must be submitted before each allocation meeting.
6. Each month recognized clubs are strongly encouraged to host one or more events including: Tabling, Volunteer, fundraisers, and etc.
7. Campus Privileges for Recognized Clubs:
  - a. An OrgSync profile,
  - b. An on campus club account,
  - c. Access to business office services, purchasing etc,
  - d. Reserve rooms on campus without incurring room rental fees,

- e. Assistance and guidance with event planning,
- f. Eligible for the on campus catering menu through Campus Dining Services
- g. Be a part of the Clubs/Organizations listed on the Colorado Mesa University website.
- h. May charge membership dues.
- i. Ability to market and advertise, and
- j. Priority during allocations.

## Registered Club

1. Have a minimum of three CMU fee paying Students with no less than 9 credit hours per semester fulfilling the roles of at least:
  - a. President
  - b. Vice-president
  - c. Treasurer
2. It is permissible for one person to occupy no more than two positions upon approval of the CAB Executives
3. All officers must maintain a cumulative 2.0 GPA during their term, a one semester probationary period will exist for those who fail to maintain a 2.0 GPA, unless approved by the CAB officers and specified in their club constitution.
  - a. Officers failing to comply will be asked to step down by the CAB Director or Assistant Director.
4. Any exceptions must be approved by the CAB Director
5. Registered clubs are required to hold 1 fundraiser per semester and it must be submitted before allocation meeting.
6. Campus Privileges for Registered Clubs and Organizations
  - a. An OrgSync profile,
  - b. An on campus club account,
  - c. Access to business office services, purchasing etc,
  - d. Reserve rooms on campus without incurring room rental fees,
  - e. Assistance and guidance with event planning,
  - f. Eligible for the on campus catering menu through Campus Dining Services,
  - g. Be a part of the Clubs/Organizations listed on the Colorado Mesa University website, and
  - h. Ability to market and advertise.

## Club Registration

### Registration Process

In order to register a club at CMU you must do so through OrgSync. There is a club registration form that must be filled out. It will then be reviewed by CAB and comments will be made about what changes need to happen to things like the constitution or E-Board (which all happens within OrgSync itself). Once everything has been approved for the club by CAB, the club may start having their meetings.

### Club Officer Training

Clubs MUST have all the officers of the club as well as the advisor attend the mandatory Club Officer Training. The details for when those happen will be posted to the Student Life website under CAB. There are a lot of training times that are offered, and attendance is taken. If for some reason none of the training times work for any officer, please contact CAB directly.

## Logo Usage

Student clubs and organizations are an important part of the college experience. It is acceptable for all student clubs and organizations to create and use their own logo, providing the logo:

- Does not violate the CMU visual identity and brand standards;
- Does not contain obscene material as defined by community standards;
- Does not contain words or imagery related to alcoholic beverages, illegal drugs or drug paraphernalia.

Student clubs and organizations are encouraged to consult with their peers in the Campus Design Studio—a student-run graphic design studio—for professional assistance in logo design. The Campus Design Studio is a full-service studio providing opportunities for graphic design students to apply creative skills and bring professional print and Web design services to CMU student organizations. You can contact the Campus Design Studio at [cds@coloradomesa.edu](mailto:cds@coloradomesa.edu)

Student organizations must identify their affiliation with the University through the proper use of the CMU logo “lockup.” This lockup should be used on all products, publications, flyers, documents, websites (including social media) and apparel. To obtain permission to use the logo lockup, student organizations must:

1. Be a currently registered student club or organization.
2. Submit vector art of their logos to the Marketing and Student Life Offices. The logo will then be reviewed by the Executive Director of Marketing and Student Recruitment, Director of Marketing and Publications, Director of Student Life, and The Senior Graphic Artist and Creative Projects Manager.

3. If approved, the student club/organization logo will be “locked” to the CMU wordmark and returned to the club/organization. Once approved the logo stays approved as long as the club/organization remains a registered student club/organization.

Any student clubs or organization that choose not to use the logo lockup, or those that are not approved to use the logo lockup, are not authorized to:

1. Use University signatures, trademarks, logos or graphics (including the CMU or WCCC signature, wordmark, acronym or intercollegiate athletics signatures, trademarks or logos, including the Maverick Head, signatures and other graphic marks and sometimes the word “Mavericks” without express permission from the University Marketing Office.
2. Use “CMU”, “Colorado Mesa University”, “Colorado Mesa”, “WCCC” or “Western Colorado Community College” in any way in the club/organization’s name, thereby indicating sponsorship or affiliation by the University.

For guidance on this, please contact University Marketing at [marketing@coloradomesa.edu](mailto:marketing@coloradomesa.edu). The organization’s logo will only need to be approved once. For more information and a copy of the standards manual, see the University Marketing website. There are many rules on trademarks and logos, so groups should always ask for guidance from Student Life and/or University Marketing.

## Budgeting

### Developing a Budget

- Off campus bank accounts are prohibited.
- Available and starting balances will be provided at Club Officer Training.
- Prepare an outline of the clubs tentative activities and cost for the coming year.
- Do careful research when determining possible sources of funding, cost of activities and available resources. Assist in getting price quotations for tentative activities and programs, especially bigger expenditures.
- Estimate expected income and when it is expected to be available (allocations, fundraiser sales, etc.)
- Rank tentative activities in order of importance according to the club and campus' interests.
- Determine which activities/programs are realistic to carry out by using your estimated yearly budget.
- Eliminate the less essential expenditures.
- Revise, review, coordinate, cross-reference, and then assemble into a final projected budget; the budget must be flexible to anticipate conditions which might have been overlooked during planning.



## Managing the Budget

- Budget should be monitored closely and often.
- Set and maintain a minimum cash balance.
- Formulate procedures and policies needed to achieve objectives.
- Keep an accurate log of financial transactions (income/expenses); which can be done by using the account ledger on OrgSync. It can be found under the Files section on the main Student Life page.
- Set up internal controls designed for safeguards and accurate accounting data. Be careful in giving out signing authority to officers who may not need it.
- Control expenditures: allow only approved expenditures to be process.

**\*Please note that all spending on behalf of a club must be approved by the club president and/or the club treasurer. Those then must be approved by Student Life Professional Staff.**

## Funding Requests

To be eligible to put in funding requests for the Club Advisory Board, you must show that you have fundraised before the CAB allocation meetings. If not, you will not be eligible to ask for funds. The Club Advisory Board has two allocation meetings per semester, four total in the school year. Each semester clubs are required to attend the general assembly meeting prior to the allocation meeting. The general assembly meeting will teach clubs how the allocation meeting is running.

## Fundraising/ Donations

Many student clubs have big plans and excellent ideas for programs or services. However, few clubs and organizations have the finances to turn these plans in to reality. It is important for student groups to have some type of fundraising plans and to execute those fundraisers.

Fund-raising proposals are due to CAB through OrgSync prior to the first funding allocation meeting of the semester.

It is important to make any fund-raising project a group effort and to get as many people involved as possible. Not only will you have more help to accomplish your goals, but you will also get more people interested in giving money. Make sure that the reason you are raising money is a legitimate cause, and let everyone know why you are raising funds.

## Planning Your Fundraiser

- Set a monetary goal and know what your overhead cost will be.
- Brainstorm for ideas with your members and see what the members are interested in doing

- Remember to follow CMU policies and procedures; ie. No use of any beverage products unless it's a Coca-Cola product because CMU has an exclusive contract with Coca-Cola.
- Find out what has been done before. What worked? What didn't? Why? How can you improve?
- Check into local and state regulations as well as CMU policies. Complete Fundraiser Proposal Form and turn into the Club Advisory Board on OrgSync at least two weeks before your fundraiser is set to take place.
- Involve all segments of your group, not just the officers. People contribute to what they create.
- Make sure they understand the cause and are willing to contribute their time and effort.
- Advertise wisely.
- Thank supporters. Give your big donors some kind of tangible reminder of how they contributed to a good cause. Create and maintain good will with these contributors, because they will tend to help in the future.
- Complete a written evaluation of the fundraiser for your club. Include things such as contact names, addresses, and phone numbers, time lines and important dates, and suggestions of things to do differently in the future.

## **Corporate Sponsorship or Donations**

One of the best ways to increase fundraising efforts is to obtain corporate sponsorship for an event, either through underwriting or direct contributions from companies. Corporations will help to fund an event if it is in their marketing plan. Are their customers likely to come to this event? Will sponsorship in an event help them attract new customers and get their name seen?

If your club/org wants to approach businesses for corporate sponsorships or donations, please submit a list of all businesses they want to contact, per fundraiser or event, to Julie Stump at [jstump@coloradomesa.edu](mailto:jstump@coloradomesa.edu). Clubs /organizations may not contact any business until business list is approved through Student Life.

## **How to Ask for Corporate Funding**

Plan far in advance. Most corporations plan their donation budgets six to twelve months in advance. Talk to a company as early as possible. Do not expect to get donations in a month. Try to target a specific company who could definitely benefit from your cause rather than sending out blanket letters to everyone. Address your pitch letter to the person in charge. Do NOT just write "To Whom It May Concern" or "Dear Sir/Madam." Call and obtain the person's appropriate name and title. Put your proposal in writing. State your cause in terms of benefits to the company.

## **What to Ask For**

- **Product:** Straight-product contributions for samples to give to participants or for door prizes. Most companies have their products in trial sizes just for this purpose.

- **Printing:** Underwriting the cost of printing posters, flyers, or t-shirts. In return, you will put their name and logo on all printed material.
- **Ads for Programs:** Sell ad space in a program that is given out at the event you are sponsoring. You may want to give companies who donate products or supplies and materials free ads.
- **At an Event:** Hang ads with logos on banners or posters for a fee. This is an excellent source of income at sporting events or anywhere there is a place to hang a poster during an event.

## Events

All clubs and organizations that are planning an event, on or off campus, are required to submit an Event Request Form to the Club Advisory Board through OrgSync no less than 3 weeks before the tentative date. All events are tentative until CAB has approved your Event Planning Form. If the event has not received CAB's approval to move forward, the club is not allowed to proceed with the scheduling and promoting of this event. It is highly suggested that the bigger the event, the earlier paperwork should be submitted on OrgSync to CAB. The Event Request Form is located on OrgSync under the events tab on Student Life's main page. There is a green button that says "Create an Event". Click that and it will take you to the form you need to fill out.

### Table & Chair Request

The Facilities Department requires all on campus groups who want to reserve tables or chairs to fill out the Table & Chair Request Form. This form is located online at [coloradomesa.edu/studentlife/orgforms.html](http://coloradomesa.edu/studentlife/orgforms.html). You can also submit your Table & Chair Request as a part of the Event Request Form on OrgSync.

### Sodexo Food Services

Sodexo has the exclusive food and beverage contract in the University Center as well as any floor in any academic building where a Sodexo Food Outlet is located. Outlets include Concessions in the Maverick Center, Jazzman's on the 1st floor of Dominguez, and Starbucks on the 1st floor of Houston Hall. Schedule all Sodexo food orders the University Center.

### Alcohol at Your Event

If a club/org is thinking about having alcohol at an event whether it is on or off campus they must get preapproval. The process must be started at LEAST one month before the event. If a club/org is considering this please set a time to meet with a Student Life professional staff at least five weeks before the event to start the process.

## Coca-Cola Beverage Company

Coca-Cola has the exclusive beverage contract throughout our entire campus, including WCCC and Montrose Campuses. Any beverages that are dispersed at any student club or organizations functions must be from the Coca-Cola line, including bottled water and energy drinks. CMU has the right to confiscate and discard any beverage product that is not a product of Coca-Cola.

## Purchasing

Through the course of the year clubs and organizations will need the help of advisors to make purchases.

### One-Card

In many instances you may use your CMU One-Card for general supplies purchases under \$5000. If you do not have a One-Card, Avery Cantrell or Julie Stump can use their card to assist with these purchases. Purchases should not be made by department administrative assistance as they do not have signing authority on club/org budgets unless they are the clubs advisor. Signing authority is solely given to official advisors and official officers only. Please note that when using your One-Card, it **must be tax exempt** per purchasing and state fiscal rules.

### Petty Cash

For minimal purchase amounts, clubs may withdraw petty cash from your club fund through Julie Stump prior to making the purchase. Petty cash is borrowed money used from the club or accounts for small dollar purchases. Clubs are allowed to withdraw up to \$100.00 in petty cash, per request. Please remember to use the Tax Exempt Form when purchasing. Once the goods are purchased, bring all remaining cash and all original, itemized receipts for the transaction(s) back to Julie Stump to close out the outstanding Petty Cash request. Petty Cash should be returned right after use and **no longer than 1 week**.

**\*If your purchase is over \$5,000 please contact Julie Stump for further instruction.**

### CMU Standard Contract

For an event in which a Standard Contract is drafted, the guest speaker/performer will need to provide a signed copy of our CMU Standard Contract, a W-9 for payment, and a Certificate of Liability Insurance. Depending on the situation SL and purchasing reserves the right to waive the liability insurance, in which case a IC Liability Release Form needs to be signed by the contractor. Once these materials are complete and turned in to Julie Stump and approved by our Purchasing Department, this event can move forward.

## Travel

Colorado Mesa University follows the State of Colorado Fiscal Rules for travel. The program involves the use of the State Travel Visa cards, selected travel agencies, awarded airlines, car rentals and lodging.

If a registered club or organization is planning on traveling, Student Life professional staff **MUST** be notified 3-4 weeks prior to the date of the trip. Please have the following information prepared; dates of travel, modes of travel (i.e. flights, rental cars, personal cars, hotel, etc.) estimated costs and the purpose of the trip. A Travel Authorization **WILL NOT** be accepted **AFTER** travel. This form must be approved prior to booking or holding any reservations.

Once traveling members return, a Travel Expense Report needs to be completed, signed by the appropriate individuals and turned into Student Life with the original, itemized receipts, within two weeks of return. All reimbursements will occur post travel.

\*Listed forms can be found at <https://orgsync.com/68884/files>

\*Roster can be created in Excel, and should include official student names, contact phone numbers, DOB, and their 700 numbers.