Student Organizations Operations Manual

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Introduction

This guide is intended to answer most of the questions one might have about operating a recognized student organization. While directed to convenors and business managers, it is also intended to serve as a resource for the entire community. It should answer such questions as "How do I start an organization?", "What does it mean to be recognized?", "How do organizations interact with SOC?", and so forth, as well as providing hints for long term planning, goal setting, budget preparation, and publicity. It is the hope of the Student Organizations Council (SOC) that this booklet will make life easier for everyone active in the organizations community. SOC would appreciate any comments organizations may have about the format of this book. Such suggestions could be incorporated into the booklet in following years.

SOC is responsible for the allocation of student activities fees and for the supervision of how those monies are spent. The Board of Trustees sets student activities fees at one percent of the annual tuition and fees charged by Earlham College. This means that SOC is always dealing with a fluctuating, but limited, amount of money. SOC's mandate is to assure that student funds are used in a manner, which benefits the student body as a whole, rather than meeting only the needs of small groups of students. SOC serves the student body at large, and makes term-by-term financial reports to show where the money is being spent. Each term, SOC runs an allocations process in which recognized organizations are invited to participate. Aside from allocations, SOC's main role is to encourage organizations to plan effectively in order to get the most for their money.

We hope that this publication proves help. If you have any questions or need extra copies of any of the forms, feel free to contact one of the SOC members listed on the Student Government Bulletin Board. Forms can be printed or submitted off the following website as well: https://www.earlham.edu/studentlife/student-government/soc/forms. You may also drop a note addressed to the Student Organizations Council. Directories of active organizations, convenors and business managers can also be obtained from SOC. **Organizations not represented at the Allocations meeting will have current funds frozen and may not be eligible to participate in allocations for the upcoming semester. This decision will be made by the SOC Executive Board.**

Starting a New Organization

The nature of Earlham's diversity encourages a variety of active organizations. Each year new groups form and old ones die out, depending on the interests, concerns, and level of dedication of the students on campus. Anyone can form a group for any purpose at almost any time, provided they stay within the guidelines of the college's Principles and Practices.

1. Decide what type of group you want to start by asking these questions.
> *What type of group would I like to form?
> *Will it be a social gathering, a networking center, a topical club, a sports club or something all together different?
> *What types of activities would you sponsor?
> *How would meetings be run?
> *Does the group need officers, how would they be designated, and what would their duties be?
> *Where would the group meet?
> *How would it contribute to the community?
> *What needs would your group strive to meet that are not being met presently?
> *Are there national or international groups that your group could be affiliated with?

2. Recruit members and create enthusiasm for this organization
> Create publicity.
> Consider involving people from both within and outside the Earlham community.
> Keep in mind that recognition by SOC requires that an organization have at least 15 steady members.

3. Define purpose by creating a constitution.
> Your constitution should include the general mission of the organization, its long term and short- term goals, and how the organization is run.
> Every SOC recognized organization must have a constitution on file.

After the group has formed, defined their purpose, and had a few small events, it may discover that it needs funding, use of the college name, and greater access to campus facilities. That is where **recognition** from SOC comes in.

Recognition

Why become recognized?

At some point in time you may decide that your group is well established and wants to develop activities and events beyond what the members are able to fund on their own. Recognition allows an organization the official use of the college's name, access to college generated funding, or use of college facilities as a group. However, SOC recognition means that your group must assume greater responsibilities. It means you must keep detailed accounting records, formalize meetings and officer selection procedures, and commit your group to a statement of purpose. SOC never makes judgments based upon your group's interests and opinions.

How does an organization become recognized by SOC?

SOC is dedicated to promoting groups which have some effect on the community as a whole: groups which plan interesting events, involve many members, and show some development of planning skills. To become a recognized organization you must complete the **SOC Petition of Recognition** and set up an interview time with SOC. The petition process is a serious process. All information much be typed. If you feel your aspirations are distinct enough to warrant the founding of a new organization, you must be prepared to defend that assertion vigorously. SOC will encourage groups (whose statements of purpose seem similar to those of organizations which have already been recognized) to consult with existing groups to ascertain whether the aims of the new group can be met within the existing student organizations. Organizations that have received recognition become eligible to apply for funding the following term. However, SOC recognized organizations can fill out Special Allocations Requests to receive money for their founding semester.

Maintaining SOC recognition.

Recognition is granted to an organization for as long as it continues to meet the expectations of SOC. These include avoidance of debt, appropriate use of funds, attendance at **ALL** SOC sponsored procedural meetings (no exceptions), and evidence of activity every term. Steps taken before loss of recognition include review and probation. The first term after an infraction has taken place, organizations are placed under review. If offenses continue, an organization is placed on probation. If the situation has not improved SOC may, the following term, choose to rescind recognition the organization. At each step along the way groups will be notified of their status and the reason they have been placed there. Each group is entitled to a hearing at each step if desired. At which the Director of Student Activities should be present. When a group loses recognition, its account is emptied back into SOC's account and the group is no longer allowed to use the college's name or expect funding.

Operating your organization.

The key to running an effective organization at Earlham is **GOAL** setting. Once an organization has a clear set of goals in mind it can make long term plans to achieve those goals. Sit down each term as a group, with your advisor and ask yourselves this question: "What do we wish to accomplish this term, and what do we hope to accomplish in the next three terms?" Once this question has been answered completely, you are ready to ask yourselves, "How?".

PLANNING allows your organization to make more effective use of its resources. It means keeping track of budgets, taking accurate minutes, doing publicity at least one week before an event is scheduled to take place (two weeks before major events), delegating authority, and making your vision a reality. Keeping good records allows members to see what the group has done in the past, and it enables your organization to prove to SOC that money is being spent responsibly.

DELEGATING AUTHORITY is the best way for organizations to make use of the varied talents of their members. Define the tasks of all official positions. Involve as many people as possible in as many activities as possible. If members feel like they cannot do anything, they are likely to move on to some other group.

When **PLANNING EVENTS** there are a few procedures you should follow. Remember to request the release of stipulated funds at least 7 business days (Monday through Friday) in advance. Contract negotiations must be initiated at least 8 weeks in advance. Space reservations, for everything from meetings to speakers, should be made as early as possible. **NOTE:** Space on campus goes quickly; it is important to plan far in advance. The Orchard Room, the Meeting House, Comstock Room, LBC 105 and Goddard Auditorium are often booked up weeks ahead of time. Use Today @ Earlham as a guide to help you choose an appropriate time (remember this is only a guide, you need to contact reservations to determine if the space is available). When you have scheduled your event make certain that the reservations person knows you want it added to Today @ Earlham .

Good **PUBLICITY** has several features. It is required of all organizations for the simple reason that the money they are spending belongs indirectly to all Earlham Students. The student body has a right to attend all functions funded by student activities money; they cannot attend events that they do not know about. Additionally, good publicity shows that your organization is active on campus, which is helpful when recruiting new members. **Please be aware that there is a sign posting policy and all student groups must follow this policy.**

A note about **FUND RAISING**: SOC's funds are limited. By fund-raising, organizations are able to find the money to do activities SOC is unable to fund. Your organization can spend money received from sources other than SOC in any manner it chooses. Fund-raising can be simple. If you had fund-raised money it is your responsibility to report this to SOC before sweeps. If this is not reported that money will not be returned to your account. All soliciting of funds outside of the Earlham College community must be approved by the Director of Student activities

<h1 align="center">The Allocations Process (funding of recognized groups)</h1>

Clear communication is necessary for allocations to succeed. Remember that the people reading about the allocations process are probably not familiar with all the things your organization does. Things that may seem obvious to members of your group are not as clear to outsiders. Explain in detail each item for which you are requesting funding. Elaboration is essential. A current inventory of all equipment and library resources in the care of your organization must be attached to the allocations form. Be sure to keep copies of all materials submitted for your organization's records. **NO LATE FORMS WILL BE ACCEPTED**!

Determine Budget.

Determine what your normal operating costs are. Does your group do a great deal of copying, make many phone calls, pay for postage, or what? After having determined the amount for day-to-day expenses, decide what events your group would like to fund. Determine the cost of these activities by breaking them down into several parts: vehicle rental, publicity, supplies, speakers, film rental, whatever. Total the amount needed for activities and the amount needed for everyday operations. Subtract this amount from the amount needed for activities and operations from the money that will remain from fundraising or other money making activities. This is the amount that needs to be requested from SOC.

Recognize Where Budget could be Cut.

The most significant criteria SOC uses when asking people to cut back on the amount of money requested is, "how large an impact is this item going to have on the student body as a whole?" The greater the number of students involved, the more likely SOC is to fund an event. Secondary, but important, concerns are the similarity of the event to others which are planned, success of such events in the past, and evidence of careful preparation. SOC encourages groups to work with other recognized organizations with similar perspectives to maximize resources when developing an event. Also, SOC allows groups to give 10% of their allocation to another recognized organization, in order to provide some flexibility.

Organizations may not need money every term; in this case they should send SOC notice to that effect, in order to retain their recognition and continue receiving pertinent information. Please submit a written notice to the SOC convenor's letting he/she/them know you are choosing not to participate in the allocations process. If SOC does not hear from an organization, it must assume the group is dormant.

Money given by SOC must be used for events that are opened to the entire community. It is extremely important to keep accurate records that detail your organizations spending in case questions arise over the organization's spending. Overnight and longer trips require the approval from the Director of Student Activities; a request must be made in writing. Organizations must receive SOC approval to spend SOC money on food. If funds are spent inappropriately SOC has the right to freeze the organizations money account or to take away SOC recognition.

Sweeps

Money allocated to student organizations is to be used in that academic year. At the end

of the academic year all SOC recognized organizations will be swept of any remaining money from their allocations. Each fall the groups will start clean with the allocation that was approved in the spring. On occasion groups may be planning large events a semester or more in advance. When this occurs groups may apply to keep their money (no sweep request). Groups who wish to not be swept must submit a typed letter with the convenors signature AND the advisors signature, requesting that the account not be swept. The group must document the reasons for this request and must supply copies of information to support the request (ie contracts for entertainers, room reservations etc). SOC will give formal written approval prior to the last day of classes in the spring. If you do not have this approval form, the account will be swept.

Swept money is placed in the SOC operating account, unless the SOC contingency fund as dropped below the necessary level. All monies in the operating account may be allocated in the form of special allocations at the discretion of the SOC.

Consensus Decision Making

All meetings on the Earlham College campus are run in the same manner of a Quaker business meeting, which means that all major decisions are to be arrived at by consensus. The process of seeking consensus is thought to be the best way of "reaching that which is of God" in all decisions. This allows time for reflection and by encouraging flexibility in the positions expressed. For those trying to lead an organization, the process of seeking consensus can often be extremely frustrating. However, decisions reached by consensus are often the most durable, since they have been fashioned to meet the concerns of all those involved. Since everyone has a hand in the decision, everyone has a responsibility for the outcome.

Allow for Enough Time.
The most crucial factor to remember when seeking consensus is to allow plenty of time. Forcing consensus by putting time constraints on people most often leads to poor decisions. True consensus involves soul-searching; it involves finding out where you really stand on an issue.

Consensus Decisions.
When participating in an organization, realize that some decisions do not need to be brought up in consensus. Calling a meeting to decide what color the napkins will be at your group's next event is not a good use of anyone's time. Choosing the speaker, or setting goals for the following term, is the type of issues that should be put to consensus. Try to limit the meeting to one big issue, and encourage members to discuss that issue freely.

Role of Leader.
Remember that consensus building is an active process. At times you may have to abandon your role as a participant in order to attempt to coordinate the ideas on the table. As various possibilities are suggested, listen carefully and restate them for the members present. Keep track of the options available. As discussion fades, draw out those who have been silent. In Quaker terminology, you are attempting to gain "a sense of the meeting". If the flow of conversations seems to have settled on a particular solution, restate that possibility and ask for

further comment. If all seem agreeable, then consensus has been reached. If, however, several options remain on the table without the membership having reached any conclusions, then it is probably best if the matter is tabled for discussion at a later date.

Tabling.

As a leader, the movement to table is made when discussion becomes repetitious; everyone seems to have said everything that is on their minds about the issue at hand but are unable to come to a solution together. Tabling allows those who have expressed reservations to examine their positions thoroughly in an attempt to see if their objections are substantial or simply the product of passion. It should be noted that by Quaker custom, all who are involved in striving towards consensus are said to be "searching for truth". When a decision is tabled, all the members are responsible for doing some heavy thinking before the next meeting.

Standing Aside.

"Standing aside" occurs when any member of the group feels strongly enough about the solution, which has been arrived at that he or she does not wish to have his or her name, attached to it, but is not sure that his or her feelings stem from truth. If a participant suspects that his or her disagreement stems from pride, jealousy or any other emotional response, it is his or her responsibility to stand aside. In this manner, one can express one's discomfort without disrupting the consensus that has apparently formed.

Blocking.

"Blocking" consensus has a measure of moral judgment in it and is not something that is done lightly. What one is essentially doing is prolonging the discussion by saying that the option arrived at is unacceptable. "Blocking" consensus is something that happens very rarely; it is something that should not happen at all if adequate time is taken to discuss the feelings of all those involved in depth.

Planning an Event

Selection of date, time, and location

When looking to present an event at Earlham it is advisable to check Today @ Earlham. This calendar contains a listing of events on campus. When reserving a date for an event, keep in mind that the College is committed in bringing and providing for the community a wide variety of events scheduled such that it allows for the greatest number of the community the opportunity to attend. Support in selecting a date, time and location, which will be in keeping with the events

policies and guidelines of the College, is available through the **Reservationist** and the **Director of Student Activities. All events should be brought to the Director's attention for consultation.**

Events, which will be marketed to the greater Richmond/Wayne County area, will need to be approved by the **Events Coordinator**.

Reserving spaces
Prior to use all spaces must be reserved through the appropriate office.

Consult Today @ Earlham
   • (https://www.earlham.edu/today/future)
The events calendar contains a listing of events on campus & off campus. A Presenter is encouraged to schedule an event in keeping with the programming guidelines set forth by the College. Consult the events planning manual on the Earlham Website.

Reserve Space
   • To reserve a space and secure a specific date for an event contact the reservations office.
   • Academic classrooms during the academic day 8:00 a.m. – 4:00 p.m. with the exception of the noon hour 12:00 p.m. – 1:00 p.m. contact:
                    The Registrar's office at 765/983-1515
   • Wellness Center, contact:
                    Wellness Coordinator at 765/983-1373
   • All computer labs contact:
                    Charmaine Barnes at 765/983-1245
   • All library spaces, contact:
                    Lilly Library, 765/983-1287
   • All other times and locations, including Richmond Room & LBC 106, contact:
                    Runyan Center Desk at 765/983-1587

Programming and Shielding Policies

Below are highlights from the Programming and Shielding Policies approved by President Doug Bennett, and Earlham Community. *See Appendix A for complete documents.*

   Basic Programming Principles

   ➢ Events are special opportunities that serve the mission of Earlham College by extending and enriching the opportunities provided by our curriculum through locally organized activities.

➢ Earlham seeks to balance its events experience by providing a rich mix of concurrent opportunities, which enhance diversity, and multicultural opportunities. The events are to be distributed throughout the semester and should improve the community life by complementing academic programs, not compete with them.

➢ The College maintains a decentralized approach to events in that different departments and areas on the campus present events, with the support of the Events Coordinator and the Director of Student Activities on the coordination, programming and presentation of the event..

➢ Space should be maintained in programming to allow for smaller events.

➢ Any groups sponsoring an event are responsible for stewardship of the space(s) and consequences for damage or abuse of such space.

➢ All community members shall act with goodwill and seek common understanding when programming and scheduling events in appropriate spaces and at appropriate times.

➢ The College operates on the concept of Intentional Programming. Groups scheduling events are encouraged to consider the impact of their event on other activities already scheduled and not schedule like events, which compete for audiences.

➢ The intent is to encourage individuals and groups to think creatively toward providing a rich mix of opportunities (concurrent and at separate times) for both the Earlham and the greater Richmond communities.

➢ A public event is any event, which is open to and marketed to the Earlham community and to the greater Richmond/Wayne county area.

➢ A non-public event is an event that is restricted to a particular group of people.

Shielding Policy

A shielded event is an event during which no other sanctioned event can be scheduled to run concurrently, with the exception of classes and non-public events.

- o Shielding can occur only within evening prime time (7-10 pm) and will be limited to only one event each evening

- o Consideration for giving an event shielded status

  - ▪ Shielding requested at time of scheduling space and date

- Impact on other events (based on past experience)
- Academic related
- Community wide programming
- Financial impact on sponsoring group (income producing / expense)
- Culminating experience for participants
- Single of multiple occurrence (i.e. number of times same program is offered)
- What other events have been scheduled for that time / day

o Junior and Senior Recitals, Productions, and/or Projects can be considered for shielding on Sunday through Thursday but not on Friday and Saturday.

o Off-campus events. In general, off-campus events will not receive shielding.

Contract Procedures

The planning of major events often includes the signing of a contract for services rendered by vendors from outside the Earlham community. These vendors may include film rental companies, speakers, bands, or vocalists, to name only a few possibilities. Signing a contract is a position of great responsibility. The simple act of signing a contract does more than merely obligate the payment of money from your organization (the college) to an outside firm or individual; it also makes you legally responsible (at least in part) should something - - anything - - go wrong. Since anyone who is negotiating, contracting, and executing a legal contract on behalf of the College is at considerable personal liability, SOC has instituted a policy which subjects contracts to greater scrutiny while hopefully diffusing some of the risk. It should be emphasized that the vast majority of contracts are executed without a problem. However, in an age when lawsuits are proliferating and legal jargon is constantly becoming more complicated, it makes sense to be cautious about such important documents.

All contracts must be cleared with the Director of Student Activities. All contracts will be paid for using funds stipulated to your organization; SOC is responsible for ensuring that those funds are being used in the manner that they were requested in the allocations process the previous term. The function of the Director of Student Activities is to ascertain the legality of all the documents involved. The first step towards formulating a contract is to meet with the Director of Student Activities. Obtain a copy of an official contract from the contracting party. If none are available, contact the Director of Student Activities, who will provide one. Return the official contract formto the Director of Student Activities as promptly as possible. The Director of Student Activities will review, sign, attach the Earlham College rider, and mail it. Remember, all official contracts must be signed by an officer of your organization, and by the Director of Student Activities. Any organization which does not follow this procedure will be immediately placed on probation and may face loss of funding and other privileges for a period up to one year.

Upon receiving a signed, official contract, and a signed Earlham College rider from the contracting party, the Director of Student Activities will arrange for the principals to be paid by

check. Your organization's Business Manager must pick up this check. It is normal practice for the contracting party to be paid at the time of the event (Earlham College does not pay deposits for performers or speakers).

The contract procedure process must be started at least 6 weeks prior to the scheduled event. The **Director of Student Activities will not entertain any late contract requests!** It is also expected that your event will be well planned and well publicized. Poorly run events will have a negative effect on future funding requests. If you have questions about this process or need advice on specific aspects of planning an event, please do not hesitate to communicate with any member of SOC or with the Director of Student Activities.

Contracts that engage artists who are not U.S citizens must be sent to the Events Coordinator four weeks prior to the event. Specific paper work must be completed for us to pay these individuals.

Airline transportation and ground transportation. Air transportation is the responsibility of the artist or the artist's agent. Student activities will pay for the flights, but the artist must make their own arrangements and send an invoice or copy of the reservation to the Director of Student Activities. If documents are received at least 10 days prior to the show the reimbursement will be included with artist's payment. If later than 10 days we will mail the check to artists address on record. We do not pay for first class airline tickets.

Marketing an Event

The marketing of an event is the primary responsibility of the presenter. The Student Activities office is available to be of assistance with the publications (events brochure, posters, programs, tickets, etc) for an event and the marketing on campus (press releases, newspaper ads, posters, flyers, SAGA signs, etc), but it is the presenter's responsibility to supply the correct complete information within the deadline dates.

Today @ Earlham – Once the presenter has received confirmation of the space reservation then submissions to Today @ Earlham can be made to the Calendar Editor. *See* *http://www.earlham.edu/today/instructions* *for complete guidelines.*

Posters and programs –Student Activities has a publicity office, forms for publicity are available in the basement of Runyan by the SOC office . The Presenter will need to provide the

basic information about the events: who, what, when and where. Be sure the information is accurate and include information about ticket prices and contacts. If a photograph is available it should be included. All materials and your request form must be submitted two weeks in advance of any activity.

<u>Other marketing opportunities</u>

- Table tents in SAGA/Coffee shop
- WECI
- Convenors list serve
- SAG Signs- materials available in the Publicity Office
- WORD – give information to the Earlham Word, they will include it in the next publication.

Sign posting policy

Preamble:

This policy was formulated in response to complaints that signs from campus groups are often removed almost immediately after they have been posted. In trying to understand why this happens, CCL became aware that there are considerable differences of opinion as to where it is appropriate to post signs, as well as the nature of what may be posted. Because of these differences of opinion, Earlham community members have sometimes felt they were justified in removing signs that students had posted. The aim of this policy is to establish criteria for posting signs in public places, so that when individuals or campus organizations follow these criteria, they can feel confident that the signs they post will not be removed prematurely.

Postings that follow the guidelines of this policy should not be removed before their designated "removal date." If signs have been posted consistent with this policy, the premature removal of those signs may be deemed to be a violation of the Principles and Practices document, and therefore may result in disciplinary action.

Criteria for Content of All Postings:

The content of all postings in public spaces on the Earlham College Campus should be consistent with the nature and spirit of The Earlham College Principles and Practices. All such postings (including banners) posted by members of the Earlham community should include:

• A name and drawer number or extension number of a contact person and / or sponsoring organization.
• A date after which the posting is to be removed. For signs advertising specific events, the date of the event is sufficient. All signs are regularly removed at the end of each semester, regardless of their designated "removal date."

General Guidelines for All Buildings:
Posting areas:

• The locations of posting areas in each campus building should be decided by the "occupants" of that building. Each building should have a contact person who would be aware of the posting policies for that building, including the locations of allowed posing areas.

• Each campus building should have clearly designated areas for posting signs of general campus interest. A list of these posting areas is available from Runyan desk (ext. 1316). In addition, many buildings will have posting areas that are "reserved" for specific types of posting. For example, a bulletin board may be reserved specifically for departmental postings.

• Because of issues of safety or courtesy, some areas should never be used for posting. Postings found in these areas will be removed immediately:

Signs should not be posted on windows or on doors in public areas, unless those areas are specifically designated as posting areas.

Signs should not be posted on mirrors or on the glass front of display cases.

Signs should not be posted over pictures or over other signs.

Posters may not be posted outside. However, banners and messages drawn in chalk on sidewalks may be displayed outside. Chalk for such sidewalk messages is available at the Runyan Desk.

As noted above, individual buildings may specify additional areas that are unavailable for general posting.

Posting procedures:

• When posting signs, individuals should not use materials that would deface buildings or posting areas. People posting signs should be careful when applying tape to painted surfaces to ensure that subsequent removal of the tape will not mar the painted surface.

• The use of materials such as paint, stickers, double sided tape, or glue can cause permanent damage to building surfaces, and is therefore prohibited by this policy. Their use will be considered vandalism.

• When posting in bathrooms, CCL recommends that postings be limited to those of concern for health, support, and security.

• CCL recommends that individuals and organizations not post multiple duplicate or nearly-identical signs on a single posting area. Redundant signs waste paper and limit posting space, so we encourage using alternatives. If, however, individuals and campus organizations choose to post multiple signs, we ask that community members be considerate of other signs. In the case that redundant postings occupy what would otherwise be the only remaining space, one of those redundant signs may be removed to accommodate a new sign.

Removal of signs:

• The removal of signs is the responsibility of the individual or campus organizations who originally posted those signs. We ask community members to keep all posting areas current. To that end, any member of the community may remove signs after the removal date has passed.

• If signs are found that are in violation of this policy (e.g., they are posted in an area in which posting is not allowed), they may be removed by any community member. However, CCL asks that community members who remove such signs should contact the sign's sponsors (if such information is available) to notify them of the signs' removal.

• With the exception of academic departmental postings, e.g., graduate school information, postings from persons or organizations that are not part of the Earlham Community should be

approved at Runyan desk prior to posting. A record of which non-Earlham postings have been received such approval should be kept at the Runyan desk. After such signs have been approved, a representative of the off-campus group which sponsors the signs may post them in the appropriate areas.

Purchasing and Accounting Procedures

Cashier Window
The cashier window is open from 9:30am a.m.-2:30 p.m. Please respect the hours of the window due to other duties that must be completed to balance out.

When you come to the window, please make sure to have the following information completed:
- § Complete account number or
- § 5 digit student organization number
- § Receipts from expenditures
- § Signatures from advisor (when necessary)

Payments
Cash payments should be turned in at the cashier window to get a receipt. No cash payments should be sent through campus mail or dropped off in boxes. Department payments should be accompanied with complete account number information.

General Information
- Accounts Receivable handles all personal accounts. The controller does department transfers. All expenses turned in for cash advances should go to the controller.
- Statements are sent out at the end of each month. There is a 1% service charge on unpaid balances over 30 days old. Statements are sent to campus drawers.
- Refunds on personal accounts by check are issued weekly, check with Accounts Payable for their schedule.

Deadlines
Please respect the deadlines imposed by the college business offices.

Check Requests
Each request in the form of an invoice or check warrant will require a complete address, including street or box number, city, state, and zip code. We cannot produce a check for a vendor without this information.

Account Numbers
Each invoice or check warrant must have a complete account number, including organization (department number) and account (type of expense).

Reimbursements

Reimbursements for individuals on campus (students, staff, and faculty) that are less than $200 must be made at the Accounting Office cashier's window. Reimbursements over $200 may be sent to Accounts Payable with appropriate receipts attached.

Stipend and Honoraria

All stipend and honoraria payment requests for non-Earlham persons must include the recipient's social security number and home address. This is required information for tax reporting for individuals receiving $600 or more in any given calendar year. All stipend and honoraria payments for Earlham persons paid on the Earlham College payroll must be paid through the Earlham College Payroll Office. No Earlham employees or students may receive honorariums.

Note: For questions please call Accounts Payable at Ext. 1270

Bookstore Purchases

Early every term SOC will send a copy of current Convenors and Business Managers to the Bookstore. Only these students will be able to make organizational purchases at the bookstore. If your organization would like to change the people that are authorized to charge items at the bookstore please contact SOC.

Petty Cash Purchases

When you need to purchase items locally (off campus) that total $100 or less, you may use petty cash. The guidelines for petty cash purchases are:

1. You must be officially registered through SOC with Accounting as the principle purchaser for your organization (usually the Business Manager).
2. Go to the cashier in the Accounting Office where you are eligible to receive up to $100 per day for purchases.
3. Bring the change and receipts to Accounting immediately following the purchase.

Accounting Procedures:

Allocations are normally released to organizations at the beginning of every term. Remember, these allocation notices show the amount of funding available to your organization for that term. At the same time, SOC will relay the information to Accounting, including both totals and instructions on what the money is to be used for. Be sure and notify SOC about who is authorized to make transactions regarding that account; that person is the only one allowed to work with Accounting. Any changes in authorized personnel must come through SOC. On the last day of every month the Accounting office will forward account statements to each organization via SOC.

The account statements are like the statements you receive for your checking account. They state the balance and summarize all charges to your account. And like a checking account,

it is possible for these accounts to be overdrawn. There are three ways to purchase something: by getting cash from the cashier in accounting, by charging it at places like the bookstore, or by obtaining a purchase order (available from purchasing, SOC, or the Director of Student Activities; they must be made out of the amount of the purchase and signed by your advisor). While the cashier will never give out more cash than is in the account, purchase orders and departmental charges (which are posted at the end of each month) are the same as checks: they will be paid regardless of the status of your account. Thus, it is possible to run your account into a deficit.

It is imperative that accounts be kept out of debt. SOC views debt as a sign of financial irresponsibility which will affect the future funding levels and possibly even the status of the organization. Keep detailed records of account balances and all transactions. It is SOC policy to cover the debts of all organizations at the end of each term. These organizations will be minimally funded for the following term and placed under review. Further debt could lead to loss of recognition. If an organization faces circumstances completely beyond its control that would cause it to be in debt, it may petition SOC for emergency funding. Emergency funding is granted rarely; if granted, however, the organization will still be considered to be in good standing with SOC.

The allocation your organization receives is placed in your 12020 account. These are accounts set up with the Accounting Office in the name of each recognized organization. Funds designated as allocated remain in the organization's account until the end of the term. Any money not used will be swept back into the main SOC account. The only time during the term that allocated funds return to SOC is in the event that a group loses its recognition.

At the end of the year money will be swept from your organizations accounts. ALL FUND-RAISED MONIES WILL NOT BE SWEPT.

Accounts Payable Procedures

Payments are made from Original Invoices, with proper account numbers written on the face of the invoice and signed by the Director of Student Activities for the Student Organization. If the organization does not issue invoices, a check warrant may be used. Check warrants serve to inform accounting to release a check. All information about the purchase must be clearly stated. All check warrants are available from the Director of Student Activities; (a copy of the check warrant form is in the appendix of this document). Warrants should only be used if the organization doesn't issue invoices. The Director of Student Activities or your advisor must also sign check Warrants.

Receipts for itemized expenses in excess of $50.00 must be attached to the check warrant. Incomplete check warrant requests will be returned for appropriate documentation before being

paid. Personal reimbursements under $25.00 must be made at the Cashier's Window in the Accounting Office. All receipts must be turned in to receive cash reimbursement.

All stipend and honoraria payment requests must include the recipient's Social Security Number and Mailing Address. This is required information for tax reporting.

Deadlines for Payment: Invoices and Check Warrants need to be turned into the Business Office by noon on Tuesday. The Business Office processes checks only once a week, every week. There will be a $10.00 fee charged to your account for any "special checks" processed after the Monday deadline. "Special checks" must be hand processed and causes check processing to slow down.

Students will not be permitted to charge any purchases for regular College departments to their personal credit cards.

Resource and Services Guide

There are many useful resources and services on campus to assist you with your organizational responsibilities. The following section was constructed to provide you with a resource and service guide. Remember that these offices also have other responsibilities. It is helpful (when services are required) to give them at least one week's notice when planning events. Otherwise they may not be able to fill your request.

Director of Student Activities
The Director of Student Activities oversees Runyan's daily operations, serves as advisor to many student groups, and assists with the coordination of programming and scheduling of student and college groups.
You can make an appointment at any time with the Director of Student Activities (at Runyan desk), ext. 1316, if you have any questions, need to reserve space for a program or meeting, if you would like assistance or information in order to develop a new event/program or service, or if you would like to discuss new and exciting programming ideas for Earlham College.

Duplicating / Printing

Copying services are available with Campus Services, located in the basement of Lilly Library. You can also use the copy card available at Runyan desk and your account will be billed monthly.

Posters can be printed for your organization at Campus Services. This will be billed directly to your organization monthly. Posters can also be made through Media Resources by a thermal poster printing machine, through making an 8 ½ x 11 original of your poster and taking it to Media Resources. If you deliver your copy by 12 noon, it should be ready for pick up by 5:00pm on the same day. If you deliver your copy after 12 noon, it should be ready for pick up the next morning. Posters are available in 2 sizes: 23 x 16 and 23 x 33. Check with Media Resources about cost.

Publicity

Be creative in your publicity, new ideas and tactics to attract the most attention. Some standard options are:

A.   Today @ Earlham is a publication that communicates current information and activities going on, on campus and off campus. You can submit information on Today @ Earlham by going to: http://www.earlham.edu/today/instructions

B.   The Earlham Word, the student newspaper, is a possibility. If you would like coverage or publicity, direct your requests to their office (in the basement of Runyan Center), ext. 1569. YOUR COVERAGE OR PUBLICITY IN THE NEWSPAPER WILL BE DECIDED BY THE "WORD" STAFF.

C.   Banners, better known as "Saga Signs", can be made by members of your organization. Banner paper is available in the Publicity Officer. Pens are available at Runyan desk or in the Publicity Office. Banners are usually placed in the Dining hall, Resident Halls, or Runyan Center. BANNERS SHOULD ONLY BE PRINTED IN THE Publicity Office. PLEASE PLACE CARDBOARD UNDER YOUR PAPER TO PREVENT PRINTING ON THE FLOOR. BANNER CAN BE NO LONGER THAN 8FT.

D.   Stuffing mail boxes. You can do this simply by copying about 1300 copies of your information and stuffing them in mailboxes in Runyan Center. Remember that many boxes are shared by two students. You must contact the mailroom to make these arrangements

> **** Posting of Publicity- - Please do not post anything on doors, on the outside of display cases, on pictures or over signs. Contact the Director of Student Activities for other posting information. The current sign posting policy is available at Runyan desk.**

Equipment

Audiovisual equipment can be reserved and checked out through the Media Resources Department, located in the basement of Lilly Library, ext. 1314.

Meeting/ Communication Aids- You can order easels, dry erase boards, chalk boards, and a flip board through Runyan Desk. You must make arrangements in advance, with the Director of Student Activities, ext. 1316.

Organizational Assistance

Officially reserved space is mandatory for organizational meetings and/or programs because of the highly used and limited availability of space on campus. Please reserve the space as early as possible by submitting a reservation online @ http://www.earlham.edu/student-activities/runyan-center/reservation-form. If you are planning a large program, lecture or theme week, please make an appointment with the Director of Student Activities, ext 1581, in order to find the best event time within the Earlham Programming Schedule. Working together promotes the avoidance of duplicating scheduling of large events in the same time period.

When you make your reservation have the following information: Name of your organization; name of the event; time of your event and the times that you will need to utilize the space; your phone number and box number; the preferred room or space; if you need Aramark, Media Resources, Security, or Maintenance Services, and any setup needs you may need.

Do not assume that you have space reserved until you have received a confirmation via email!

Trip/Event registration can be facilitated at Runyan Desk. This service is ideal for events that require a fee or pre-registration. You can tape a clearly identified sheet to Runyan Desk (to either side of the front counter) for signatures or you can place the sheet in a folder and leave it at Runyan Desk for availability when specifically requested. Please contact the Director of Student Activities with the information prior to using one of the options above so the information can be accurately distributed when requested.

Keys- If your organization has permanent space in Runyan Center Student Offices, (WECI, Earlham Word, ESG, Sargasso, Specturm) it is the convenors responsibility, during the first week of classes, to schedule a time with the Director of Student Activities to complete official security key forms (available @ Runyan Desk) for every appropriate member of your staff. Once you have completed the form bring it to the Runyan desk for the Director of Student Activities to sign.

Vehicles
All Drivers must have certification from Safety and Security. Please Read the Fleet policy in the appendix of this manual

College vehicles may be rented from the Safety and Security Department located in the Security Building. They should be reserved well in advance; it is useful to remember that the college has other priorities besides your organization's event, so vehicles may not be available at all times. Reservation forms for each trip must be completely filled. You can find the form at http://www.earlham.edu/security/content/vehicle_form.html . All drivers must be registered with the college before the trip for insurance reasons. Drivers are personally liable for accidents in which they are in violation of traffic law. Personal use of vehicles is not permitted.

The cost of vehicles is figured on going rates for gas, maintenance, etc. contact Campus Safety and Security for the actual rate, all fees include gas. Be sure and familiarize yourself fully with the "Vehicle Guidelines" and "Driver Guidelines" information, which the Security

Department provides. Fines may be imposed for failure to follow any of the rules established by the department. Especially crucial is that the vehicles are picked up and returned on time. Notify the department of unforeseen schedule delays. All vehicles must be returned clean and with at least 1/4th a tank of gas. Credit cards are included in the packet you pick up with the vehicle. If you must fill the tank, use only self-service islands.

Student groups planning off-campus trips must leave with security a list of all occupants of the college vehicle, where you are travelling to and a cell phone contact for at least one student in the vehicle.

All groups travelling for than 100miles from campus must have a faculty or staff person with them.

Please remember that rental of an off campus vehicle with college funds places you under the same guidelines as if you had used a vehicle from the motor pool. Also using a private vehicle for campus activities must also follow the fleet policies.

Campus Services

Campus Services is located in the basement of Lilly Library. They may be helpful for publicity or copying needs. A current price list can be picked up any time during normal hours, which are 9:00am – 6:00pm remaining open during lunch. Among the services provided are copying, special typing, labeling and bulk mailings. Student Organizations may establish charge accounts at Campus Services, usable by one or two members whose names must be filed with SOC.

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Faculty/Staff Advisors

(All SOC recognized groups must have an active faculty/staff advisor.
Advisors must be current full time faculty or staff)

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The following lists and explanations fall into two groups: the steps advisors and student organizations need to take before coming together and the ideas they need to keep in mind after the relationship has started. At any time, if either party feels that prescribed assessment documents may be helpful; these can be obtained from the office of Student Activities upon request.

The first step in creating a working and strong relationship between students and advisor is for the group to give thought to choosing an advisor.

a) When choosing an advisor, the student organization should determine goals, brainstorm ideas and eventually come to a consensus on whom to ask.
b) Contact the person or persons you think would be good advisors.
c) The student organization should think about the possible length of office for their faculty/staff advisor and discuss this with the advisor.

The second, but probably most important aspect of creating a relationship between the advisor and student organization is the step of self-evaluation.

a) It is important for both parties to define their own expectations of the relationship, to assess their personal and political positions, and to anticipate achievements that may arise out of the relationship.
b) This self- assessment should be written down. It should consist of a list of outcomes that each of you; either the advisor or student members of the organization want to gain from the relationship. This document can then be used throughout the year as an indicator of successes and where work needs to be done to make sure that everyone involved feels the relationship is beneficial.

The responsibility for building the relationship between the advisor and the student organization must be shared between both parties. At the initial meeting between the advisor and the student organization, an open discussion must be held to discuss all aspects of a student group, from goals to make-up of the organization.

a) Part of the initial meeting should be to ensure that everyone's interpretation of the group's constitution all fit into the organization.
b) The group's strategic plan of action can then arise out of the initial meeting. This group plan of action then helps both parties in communicating. This plan should always be open for negotiation and re-evaluation.

Both the advisor and the members of the student organization need to take the time to get to know each other on a more personal level. Only then does the relationship take on the role of friend and only then can both parties gain the most of their working together.

Ideas to keep in mind throughout the year
Open communication is the basis of effective and functional relationships. The advisor and students need to develop a close relationship.
a) At the beginning of the school year, the advisor and the students should get together and make sure they have similar goals and expectations of what they want to happen. At the end of the school year they should evaluate how they felt the year went, things they want to change and things they felt went really well.
b) If at any time, a level of dissatisfaction should develop, neither the advisor nor the students should be afraid to communicate the source of the dissatisfaction. Since a proactive stance is better than a reactive one, no one should be afraid to discuss possible downfalls in the organization. You should also feel comfortable asking any member of SOC to help facilitate discussions.
c) Advisors and students should be aware of college policies, restrictions and avenues for achieving their objectives.
d) Advisors should be able to communicate effectively the feelings that faculty and staff have about specific issues. They should be prepared to listen effectively to students and provide constructive feedback.
e) In the case of problems that may arise, it is a smart move for the advisor and the students to keep each other informed; as Lyndon Johnson once said, "There are no problems we cannot solve together and very few that we can solve by ourselves."

f) Everyone in the organization, including the advisor, should be kept up-to-date on financial matters. This idea is especially important in those organizations, which receive funding through SOC.

g) Minutes of all meetings should be kept, shared among members and the advisor, and for the purpose of archival and continuity within the organization, be stored in the filing cabinets located in the SOC Office.

h) Convenors should always include advisors in the planning process for meetings, the agenda process and any retreat that the organization might have for members.

i) Advisors and students involved in the organization should make themselves available to each other for council and referrals to help in personal situations as well as situations in the organization.

Everyone should keep in mind the extraordinary amount of time committed by the officers, advisors and members of student organizations and recognize these efforts in some way such as a recognition banquet or other special program.

When considering the long-term continued life of a student organization, it should be remembered that the recruitment of leaders and advisors must be in the back of everyone's mind during the entire academic year. When one is prepared to replace yourself with someone as effective as you, as a student or an advisor, one prepares for the future and not the past.

It is very obvious that communication on several different levels is of utmost importance in an advisor and student organization relationship. By working closely with an advisor, a student organization can only help to better the community and the people involved.

Advantages of Having a Faculty/ Staff Advisor

1. An advisor can provide continuity and stability to a group. S/he can more easily provide advice on organizational affairs after a period of developing familiarity.
2. Generally having more diverse experiences, advisors can add to a group.
3. Advisors tend to have more expertise with issues of liability.
4. Advisors can bridge the gap between transitions of leadership.
5. Advisors can act as a liaison between the organization and the administration.
6. Advisors give advice and can serve as conflict managers.
7. Advisors can attend meetings and help convenors to see undercurrents s/he might not otherwise see.
8. An advisor should always assist the Business Manager of an organization with financial accountability and record keeping.

Leadership Position

When new people become leaders of your organization, it is important for you to work together on leadership transition. This transition process minimizes confusion and it helps incoming leaders become more aware of the organization's culture. The transition process should

begin as early as possible. You want them to be able to hit the ground running when they take over. The following are some ideas on how to make the transition a smooth one.

1. Share any helpful advice, procedures and recommendations.
2. Let them know what the organization has done in the past, what projects it is currently working on and what projects are planned for the future.
3. Orient them to any organization's files and records
4. Introduce him or her to the people they will be working with.
5. Acquaint them with the organization's mission statement and constitution.
6. Give them resource and contact lists.
7. Give them any mailing lists.
8. Let them know what their job description is as well as other group members' job descriptions.
9. Let them know where you can be reached if they have any questions.
10. Tell them everything you were told or should have been told when you took over.
11. Make sure they know how to use the office equipment.
12. Explain to them what leadership style you found most effective. (They may or may not want to use it, but at least they will know how things were run in the past.)
13. Share your personal expertise.

Make certain that they understand who SOC is and what they do. Before you leave contact SOC with information about the new leaders. If you do not make certain this is completed the next officers will have a tough time getting started. Email new officer information to convenors@earlham.edu. Be as helpful as you can, but do not tell them what to do. Just give them advice and suggestions. Surely they will be very grateful for all of your help. You will be helping them, but most importantly you will be helping the organization.

SOC Petition of Recognition- To Become a Recognized Student Organization
The Students Organization Council (SOC) encourages the formation of new organizations when students' needs are not being met by existing groups. A student group desiring recognition by SOC must submit a written constitution to SOC to begin the process. A sample constitution has been provided below. In order to be recognized by SOC, an organization must fit the criteria listed in the SOC Policy for Student Organizations, (see back side of page).

Please include date, contact person, box number, email and extension.

Article 1- Name and Purpose
   Section 1.   Name of the proposed organization.
   Section 2.   Mission of above (to be published in the Student Organization booklet)
   Section 3.   Reason for forming organization
   Section 4.   Long term goals of organization

Article 2- Membership

      Section 1.   Requirements for membership: must be open to all interested Earlham College students as indicated on the back of this form.

      Section 2.   Number of interested members forming group (please include list of names)

Article 3- Officers and/or Leaders

      Section 1.   Leadership positions (must have business manager and convenor)

      Section 2.   Duties of Officers- depending on your group, you may wish to clearly define the roles and duties of each officer.

Article 4- Selection of Officers

      Section 1.   Type of selection (consensus, election, etc)

      Section 2.   Criteria of selection (optional)

Article 5- Meetings

      Section 1.   How frequently you plan to meet as a group

      Section 2.   Where and when you plan to meet as a group (optional).

Article 6- Quorum

      Section 1.   What a quorum consists of (how many members or officers must be present to make decisions)

      Section 2.   When a quorum is required (for elections or other important actions of the group).

Article 7- Amendments and By-Laws

      Section 1.   Provisions for amending the constitution.

      Section 2.   Provisions for By-laws. (By-laws may or may not be required by your organization, depending on the complexity of your organization.)

Article 8- Faculty Advisor (Administrative or Teaching Faculty)

      Section 1.   SOC requires that all student organizations have a faculty advisor

EARLHAM COLLEGE FLEET POLICY
Amended and Approved by the President August 30, 2005

Campus Safety and Security is responsible for maintaining the College vehicle fleet. As of November 22, 2004, the College eliminated all 15-passenger vans from the fleet and does not allow off-campus leasing of them. The College fleet is used solely for College-related activities and may not be used for personal trips.

Priorities for the Issuance of College Vehicles
Priority is reserved for trips scheduled 30 or more days in advance. For groups providing less than 30 days notice, college owned vehicles are available be on a first served basis.
   In order of priority:
   - **Course related activities led by a faculty member driving, e.g. biology, geology, Model UN**
   - **Athletic teams**
   - **Service Learning**
   - **Other administrative and teaching faculty trips**
   - **Student activities with faculty member driving, student clubs and club sports**
   - **Student activities with no faculty member driving**
   - **Rentals to affiliated groups, e.g. ESR, Bethany, etc.**

Approval of Drivers for College Vehicles
   - **Campus Safety and Security and Earlham's insurance carrier must approve all drivers.**
   - **Student drivers must complete and pass training sessions for 12-passesnger vans.**
   - **Drivers with multiple moving violations may be prohibited from driving college vehicles.**
   - **Drivers issued a citation or traffic violation ticket as the result of an "at fault accident" are not be permitted to drive college vehicles for one year.**

Parameters of Campus Vehicle Use
   - **Adverse weather and weather advisories may result in cancellation of vehicle use.**
   - **At all times, all occupants of college vehicles must wear seat belts.**
   - **For trips beyond 100 miles, a faculty member must be in one of the vehicles on the trip.**
   - **Drivers must rotate every two hours on trips over 100 miles.**

Outside Leasing by Authorized Agents of the College
   - **If no Earlham vehicle is available, Earlham College departments and summer programs must make their own arrangements for vehicle rental.**

- **Campus Safety and Security and Earlham's insurance carrier must approve all drivers.**
- **No vehicle larger than a 12-passenger van may be rented.**
- **All student drivers must complete and pass a training session for 12-passesnger vans.**
- **Seat belts must be worn by all occupants of college-leased vehicles.**
- **For trips beyond 100 miles a faculty member must be in one of the vehicles.**
- **Drivers must rotate every two hours on trips over 100 miles.**

Training

Twice a semester, Campus Safety and Security offers group training for new drivers of 12-passsenger vans. Departments and programs are encouraged to provide training for their student drivers.
- **Maneuvering a 12-passenger van in large and small parking lots on campus.**
- **Backing the van and use of the vehicle mirrors.**
- **Experiencing the turning radius of the van around curves on campus.**
- **Off campus practice on an as- needed basis.**

Exceptions to the 100 mile Limit for Trips not Accompanied by a Faculty Member
There exist a few special cases where the 100 mile limit on trips with no faculty member rule would create serious handicap to our academic program. The Director of Safety and Security is authorized to grant exceptions and allow such longer trips without faculty member attendance, but only under the following provisions:

1. The trip must be part of an Earlham for-credit activity, and
2. The faculty member can assure the Director that all prospective drivers have been trained in driving vans (if a van is to be used), and
3. All travelers must be enrolled in the activity, and
4. There is documentation of the above two provisions, by signing a form or sending an e mail.

Petitions to allow such trips (without faculty) but which is not for-credit should be submitted by a sponsoring faculty member to the Director of Safety and Security and will be reviewed by the Provost, Dean of Student Development, and Vice President for Finance.

Such petitions are likely to be approved only under the following circumstances: that provisions #2, 3, and 4 above satisfied, that the activity is closely related to the college's educational mission, that a faculty member is actively involved (even if not traveling), and that the college is actively sponsoring the wider effort from which this trip arises. (Financial support by the Student Organizations Council does not constitute college sponsorship).