



Student Organization Officer Training

UWM Student Involvement



Introduction

Throughout this training course you'll learn about the **Roles, Responsibilities, Opportunities, and Resources** that are a part of being an officer.

- Please note that the quiz is also a part of the training
 - Quiz results do not carry over from year to year
 - There will also be a portion of the quiz dedicated to providing feedback on the training
- The training, along with the quiz, should only take approximately 20 minutes to complete
- At the end of the training and quiz, you will receive a confirmation email that also contains more links and information in regards to resources pertinent to being an officer of a student organization

Let's get started!

Roles, Responsibilities, and Opportunities Overview

Roles	Responsibilities	Opportunities
Leader	Running meetings	Lifelong skills in leadership, communication, organization, and more!
Facilitator	Checking Email/Mail	Make a difference within your organization and community
Mediator	Keeping a budget	Build experiences that will help you reach your goals
Record keeper	Completing necessary paperwork	Access to personal and professional development opportunities
Mentor	Knowing legal rights and responsibilities	Networking with other officers, orgs, and UWM staff
Organizer	Keeping accurate records	Leave a legacy within an organization
Collaborator	Maintaining your PantherSync page	Practice skills you'll need in your post-graduation career
Communicator	Applying for SAC grants	Did we mention leadership?!

Roles of an Officer

Think about what it means to be an officer and the various aspects of your position....

Facilitator

A facilitator is someone who helps a group of people understand their common goals and assists them to plan how to achieve these goals.

A facilitator is often neutral and guides discussion, keeping to the topic, and ensuring everyone can contribute.

Mentor

Mentoring is a partnership founded on trust that can improve self-esteem, help set goals, and offer new experiences to those that are being mentored.

Mediator

A mediator is someone who attempts to assist people in conflict come to an agreement while remaining neutral.

A mediator listens to all concerns in guiding those involved to a resolution.

Leader

Leadership takes many forms. You may lead the charge or empower others to do so.

A leader can inspire, envision, influence, and take action while being open and authentic.

Responsibilities of an Officer

As an officer, you will find that you have a plethora of responsibilities, tasks, and goals.....

Organization Renewal

You must renew your organization each year starting in early August. You'll update the org's profile on PantherSync, read the RSO contract, and update officers and membership rolls.

Inventory

Each year, at the end of the spring semester, organizations with inventory must complete an Inventory Condition Agreement form. This form is used to keep track of any inventory and determine if items are lost or broken.

Campus Mail

Each organization has a physical mailbox on campus, most of which are on the 3rd floor of the Union. Be sure to check it regularly

Campus Email

Your student email address will be used to send important information, updates, and newsletters. Check your email regularly to keep on top of current events.

Responsibilities of an Officer

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Timelines and Schedules

Developing schedules and timelines for tasks and goals will keep your organization on track. It also allows you to be aware of important deadlines for Renewal, SAC Grants, Involvement Fair and more.

Record Keeping

Keeping accurate and timely records of what goes on within the organization is important. From meeting minutes to budget planning, ensure that your org is saving its records. Try using the PantherSync Files tab to store those records.

PantherSync Page

Each organization has its own PantherSync page and access to many valuable tools within. Keep the page up to date by maintaining officer and membership lists, storing files, and creating new posts and conversations.

Responsibilities of an Officer

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Legal Responsibilities

In becoming an officer for your organization, it's invaluable to learn what legal responsibilities you may have. Below are some key points to keep in mind. Links to more information will be included in the resource email sent upon completion of this presentation.

- Student organizations are affiliated with, but not official units of the University.
- The University is not liable for the actions of student organizations. As a result, sometimes orgs need to purchase their own insurance. Officers can be liable for their organization.
- Student organizations are subject to all applicable local, state, and federal laws and ordinances, as well as the safety codes and policies of the University.
- Student organizations may NOT use the University's non-profit status.
- Read and ask questions regarding the Registered Student Organization Contract at www.rsocontract.uwm.edu
- Review the contents of the Student Organization Manual which officers are expected to comply with at www.rsomanual.uwm.edu

Responsibilities of an Officer

As an officer, you will find that you have a plethora of responsibilities, tasks, and goals.....

Bank Accounts

Many organizations have bank accounts used for fundraising or membership dues. Keep in mind the following:

- ❖ All student organizations will need a Federal Employer Identification Number (EIN) to open a bank or credit union account. This number is issued by the IRS and the application is now an online process.
- ❖ The IRS website includes a section on “misplaced EIN numbers” and how to go about getting the number.
- ❖ Organization accounts should be set up like small business accounts with a minimum of two officers working with the account for checks and balances as well as conflict of interest of payment.
- ❖ Always remove account access from officers no longer with the organization.
- ❖ A basic EIN does not provide non-profit charitable status for a student organization. The process of becoming a non-profit charitable organization is complex and costly. National organizations that local student organizations are part of have likely completed this process.
- ❖ Funds held in bank and credit union accounts are separate from any funds a student organization may have in University accounts including SAC grants.

Responsibilities of an Officer

As an officer, you will find that you have a plethora of responsibilities, tasks, and goals.....

Bank Accounts

Many organizations have bank or credit union accounts used for fundraising or membership dues. Keep in mind the following:

- ❖ A Federal Employer Identification Number (EIN) is required to open a bank or credit union account. An officer of the organization must request the EIN from the IRS. The process is online and involves registering the officers SSN number with the student organization to the IRS.
- ❖ Funds held in bank and credit union accounts are separate from any funds an organization may have within University accounts, including SAC Grants.
- ❖ Officers are responsible for the bank and credit union accounts and at minimum should perform the following:
 - ❖ Restrict access to key officers, removing access from officers who are no longer with the organization.
 - ❖ Review account transactions on a regular basis to verify accuracy
 - ❖ Reconcile the account on a regular basis and report status back to the organization when necessary.
- ❖ Organizations that use University resources such as facilities or SAC Grants may have their bank or credit union accounts audited at the request of the University.

Tools and Resources Overview

Student Involvement provides easily accessible Tools and Resources that will help you become successful in your new position.

Student Involvement	Campus Departments
Staff Liaisons	Faculty/Staff Advisors
Business Manager	SAC Grants
PantherSync	Union Marketing
The Spark and the Leading Edge	Reservations/Event Services
Leadership Development	
Personalized Trainings	

Stop by the Student Involvement Desk in Union 355!



Student Involvement

Located in Union 363, Student Involvement's front desk staff serve as a resource center for student organizations. Here you can....

- Get questions answered about campus policies, event planning, organizational finances, and much more.
- Meet and set up appointments with your Staff Liaison
- Sign up for PantherSync training
- Get helpful handouts on various topics regarding student organizations.

Stop in in-person, Call (414)229-5780, or Email activities@uwm.edu anytime!



Faculty and Staff Advisors

Each student organization has a faculty or staff advisor. Like officers, advisors have a variety of roles with an organization including a mentor, teacher, leader and follower.

An advisor can provide the student organization with support that the students may not have thought of such as:

- Assisting the student leaders with administrative processes.
- Providing support from related academic or service departments.
- Providing the organization with some connection to University administration and services.
- Assist in providing a past history of the organization to new members.
- Serve as a "sounding board" to bounce new ideas off of.
- Planning and assisting in the leadership development of all executive officers and general members.
- Providing an outside perspective or view on various policies, decisions or activities.
- Helping deal with organizational crises.

Staff Liaisons

Each organization is assigned a staff liaison according to the type of organization it is categorized as: Cultural, Department/Academic, Fraternity/Sorority, Governance, Honor Society, Political, Recreation, Religious, Service, Social Action, and Sports Clubs.

- Serve as the primary point of contact for questions for Student Involvement.
- Assist with event planning procedures for any university event.
- Provides support and resources to officers and advisors.

Business Manager

Student Involvement's Business Manager assists student organizations with financial management.

The Business Manager can:

- Assist in planning and reviewing SAC Grant applications.
- Guide organizations when using SAC Grants.
- Provide support and resources regarding fundraising.
- Help to develop processes to ensure proper financial administration of organization finances.

The Spark and The Leading Edge

These bi-weekly email newsletters contain a wealth of information for officers!

The Spark

This newsletter covers a unique topic each issue and offers insight and advice in applying it to your organization. Some past topics have included:

Conflict Resolution

Time Management Skills

Budgeting and Record Keeping

Social Media

The Leading Edge

This is an informational newsletter that will help you keep up to date on things happening in Student Involvement, the Union, and the campus.

Important deadlines, events, and workshops are just some of the headlines.



Leadership Development

As a student organization officer, you are encouraged to take advantage of professional and personal development offered through leadership programs on campus. Programs include workshops, half-day and full-day conferences, and more in-depth leadership experiences.

For a full list of current leadership program offerings, visit: involvement.uwm.edu/leadership.

SAC Grants

Funding an organization can be a challenge. The Student Association's Student Appropriations Committee (SAC) provides grants for Registered Student Organizations through an application process:

1. Attend a mandatory RSO grant training
2. Complete an application
3. Sign up for and attend a grant hearing

Roughly \$500,000 is awarded each year to RSOs to support on-campus events, operations, and travel opportunities. The application process begins roughly at the start of each semester for awards that will be granted for the following semester

For example: If you'd like to receive grant money for an event in the Spring semester, you must apply for grants starting in September of the Fall semester.

Union Marketing

Location: Union WG50 Email: markdesk@uwm.edu

Each organization has the opportunity to work with Union Marketing to create materials to promote their organization and events.

Free Services :

- Production/Design assistance for resizing, text adjustments, and file reformatting on pre-designed files.
- RSO Brand/Logo Development.
- Event/Promotional design.
- Consultation and content development for social media, advertisement, press relations and strategic marketing.

Additional Cost Services (Cost of goods):

- Duplication and specialty publication support (booklets, mailers, flyers, special sizes/colors/finishes, cut & fold, lamination).
- Development, production and/or ordering of small promotional items(stickers, pens, water bottles, etc...)
- Production of large format applied graphics for windows, doors or walls
- Custom signage created/updated in vinyl or applied graphics
- Posters and Banners created in matte or glossy paper and light weight vinyl

Union Event Services

Location: Union 300 Email: reservat@uwm.edu

This office will work with you on all your event planning needs within the Union, as well as serving as the liaison for using other campus spaces.

- Most rooms and general Audio/Visual equipment are pre-paid through Student Fees.
- Additional fees are charged for larger events such as banquets, or when personnel is needed for set-up or some A/V equipment.
- Staff will guide you through planning an event and answer questions or concerns you may have.

Use their VirtualEMS system to reserve rooms throughout the year.

PantherSync

PantherSync is a multipurpose online tool for student organizations, Student Involvement, and other campus departments. Among the many ways in which you can utilize these tools are:

- Creating and marketing meetings and events
- Storing important organizational files
- Creating forms and surveys for gathering opinions, information, and feedback from your members
- Keeping up to date on news around the campus
- Creating photo albums
- Using the Treasury tools for budgeting and accounting
- Messaging, Polls, To-Do Lists, and Videos as well.

If you'd like to learn more about using PantherSync, you can contact Student Involvement and schedule a training session.

Final Thoughts

Being a student organization officer can offer many challenges to yourself and your student organization throughout the year. Always remember that Student Involvement is here to help in any capacity that we can! We hope that the resources we discussed can be of use to you and that they will make your job as an officer easier as you go throughout your term.

Also, be sure to take time to enjoy being an officer. While it can, at times, be stressful, remember that you are serving your organization and take the tough times as great opportunities for learning. On the contrary, also take time to celebrate the success that your organization will have over the next year! Everyone is in this together and everyone ultimately wants to see their organization succeed.

Summary and Quiz

By learning more about Roles, Responsibilities, Opportunities, and Resources, you've taken a big step towards success as an officer.

Your next step after completing this course is to return to PantherSync. In the form there will be a link to a short quiz. You must complete the quiz to complete the training.

Remember: following the quiz you will be sent resource information via email that can serve as reference guide to the things you've learned today.

If you have any questions please contact Student Involvement or your Staff Liaison at activities@uwm.edu

The PIN to access the quiz is: 8672