

STUDENT ORGANIZATION MANUAL

The Office of Leadership & Engagement | Fall 2022



NAU NORTHERN ARIZONA
UNIVERSITY

Leadership and Engagement

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STUDENT ORGANIZATION BASICS

Student organizations at Northern Arizona University are designed to serve students and contribute to the academic, political, cultural, religious/spiritual, social, or recreational life of the campus. Student organizations are a valuable part of the student experience and provide opportunities for students to take on leadership roles and build skills related to organizational development and administration, event planning, fundraising, budgeting, marketing, and public relations. Student organizations also provide learning experiences specific to students' areas of academic or extracurricular interest.

While the University supports student organizations, registration of a student organization with the Office of Leadership & Engagement does not constitute University endorsement or approval of the policies and/or activities of the organization. No student organization should represent or imply that it speaks for or in the name of Northern Arizona University.

Membership

- A. Northern Arizona University values the diversity of the human experience. Student organizations should intentionally strive to enrich themselves and ensure access by inviting membership from a diverse range of students on campus.
- B. Membership in a student organization is generally limited to members of the University community. Nonmembers of the University community who are also members of scientific, academic, scholarly, and/or honorary organizations that have recognized units or chapters on the NAU campus may become affiliated with that organization.
- C. In order to hold an officer position in a registered student organization, a student must meet the following academic requirements:
 - 1) The student must be registered for a minimum of seven units at Northern Arizona University. Exceptions may be made for graduate students.
 - 2) The student must have a minimum cumulative grade point average of 2.25 for all NAU course work undertaken.
- C. Individual student organizations may impose higher standards regarding minimum grade point average and other membership requirements.
- D. Each organization must have a membership of at least five (5) currently enrolled students with at least two (2) officers. The organization must verify this via an updated roster in the True Blue Connects system.
- E. Each registered student organization must have an adviser who is a full-time NAU faculty or staff member. In addition, student organizations may choose to have other advisers such as graduate students, community members, or members of clergy. The group determines the choice of adviser and may change advisers at any time.
- F. Northern Arizona University prohibits discrimination in organizational membership on the basis of race, color, religion, sex, national origin, age, disability, veteran status, sexual orientation, gender identity, and

- G. genetic information. Title IX of the Education Amendments of 1972,
- H. Section 106.14, makes an exception for social fraternities and sororities with regard to gender requirements for membership.

Removing a Club Member or Officer

Members can be removed from the organization for a variety of reasons including discriminatory comments, allegations of inappropriate conduct, or disruption of club activities. The Office of Leadership & Engagement supports student organizations making decisions regarding club membership so they can best operate their clubs. All student organizations adhere to the NAU Anti-Discrimination Policy:

Northern Arizona University prohibits discrimination in organizational membership on the basis of race, color, religion, sex, national origin, age, disability, veteran status, sexual orientation, gender identity, and genetic information. Title IX of the Education Amendments of 1972, Section 106.14, makes an exception for social fraternities and sororities with regard to gender requirements for membership.

We always recommend discussing any conflict with members directly, providing feedback, and sharing expectations to maintain membership. This way, members aren't being removed without an opportunity to learn, listen, and resolve things – an essential skill for all of us. We also recommend consulting with your club advisor and/or the Office of Leadership & Engagement to discuss and problem solve. Possible violations of the Student Code of Conduct, Sexual Misconduct policy, or anti-discrimination policy must be reported to www.nau.edu/reportit.

All Active Members have the ability to request the removal of another member, including an officer of the club. Below is a recommended procedure for removal of a club member or officer.

Any Active Member who wishes to have another member removed must present their reasoning in writing to the executive board and advisor through an email/electronic or hard copy documentation. Once the complaint/request is brought to the executive board, the following process would take place:

- 1) Individual would be notified of the complaint by the executive board
- 2) Evidence to support complaint is presented, if appropriate
- 3) Individual given an opportunity to argue a defense and offer counter evidence, if appropriate
- 4) Vote is taken by the executive board
- 5) A majority vote by the executive board will result in the removal of the member in question
- 6) Communication regarding the reason for the dismissal is provided to the individual member
- 7) Resources shared with individual (e.g. Lumberjack CARE Center, Counseling Services, Equity and Access Office, etc.)

We recommend documenting your decisions and ensuring these processes are clearly stated in your bylaws and shared with membership.

Types of Student Organizations

NAU student organizations are classified into the following categories and groups may designate multiple categories. Student organizations self-select the categories they wish to be in with some exceptions. Groups wishing to be included in the Fraternity and Sorority categories must be recognized by the Office of Leadership & Engagement. Groups wishing to identify as a Sport Club must be recognized by the NAU Sport Clubs Program.

- **Academic** student organizations comprise the largest number of clubs and organization on campus. These include any organization that is affiliated with an academic program or college.
- **Advocacy** student organizations are those that advocate for a particular cause or population of students.
- **Sport Club** student organizations are sports teams or groups engaged in active practice and competition against other schools or individuals. The Office of Leadership & Engagement collaborates with Campus Recreation Services to support these organizations. (See additional information on page 8-9.)
- **Cultural** student organizations represent and promote the traditions and activities associated with a particular culture.
- **Fraternity** and **Sorority** groups are associated with national social Greek-letter fraternities and sororities that select membership through a bid process. (See additional information on page 8.)
- **Recreation/Game** student organizations focus on recreational activities and games in a non-competitive atmosphere.
- **Religious** student organizations may also register with the Office of Leadership & Engagement.
- Although the university, as a state institution, is prohibited from promoting religious activities, it recognizes the importance of religion and spirituality in the life and education of its students.
- **Representative** student organizations are those elected bodies that represent the general student population.
- **Residence Hall Councils** are groups that represent the concerns and interests of a particular residence hall
- **Service/Honorary** student organizations are academically-focused groups that limit membership based on certain requirements or community service-oriented groups.
- **Special Interest** groups are not connected to an academic program or college. They serve the needs of students with specific special interests.

Procedures for Registering New Student Organizations and Maintaining Active Status as a Student Organization

Existing student organizations must register annually with the Office of Leadership & Engagement to maintain their active status. New student organizations are allowed to

seek registration status throughout the academic year but once registered they need to re-register annually to remain active.

A. Individuals seeking to form a new or reactivate an old student organization shall:

- 1) Log in to True Blue Connects and complete the "New Group Registration" or "Group Re-Registration" request form.
- 2) Upload to True Blue Connects a constitution containing:
 - a) Statement of Purpose
 - b) Statement of Nondiscrimination
 - c) Organizational Structure
 - d) Provision for Regular Meetings
 - e) List of Activities
 - f) Provide in True Blue Connects a list of officers.
- 1) Provide in True Blue Connects the name, email address, and phone number of full-time faculty or staff adviser.
- 2) Provide in True Blue Connects a roster containing the names of student members.
- 3) Professional fraternities, societies, or clubs, associated with a particular academic discipline shall, in addition, submit evidence of approval and sponsorship by the dean of the college with which the organization is associated.
- 4) Organizations wishing to use Greek letters in their name must be affiliated with a nationally or internationally recognized organization and must have a national office supported by full-time staff members or a national board. This applies to all types of organizations including social, professional, academic, honorary, or other groups.

B. National fraternal organizations need not present constitutions which contain secret clauses provided:

- 1) Assurance is obtained from the Office of Leadership & Engagement that the constitution is in order.
- 2) The National is formed from a previous local fraternal organization and no changes have been made.

It is assumed that each residence hall, fraternity, and sorority has adopted or will adopt its own hall or chapter rules and procedures for the enforcement thereof.

C. It is the policy of the university to register any student organization formed in good faith for a lawful purpose consonant with the objectives of the university. A group of students may organize and secure official registration provided that the proposed organization: represents an academic, political, cultural, social or recreational

contribution to the life of the campus; is not for profit in nature (student organizations are not required to obtain legal nonprofit status); does not discriminate in the selection of members on the basis of sex, race, color, age, national origin, religion, sexual orientation, disability, veteran status, gender identity, or other legally or policy protected status; agrees to abide by the University Hazing Policy and other university regulations; and has followed the established administrative procedures required for registration. The Office of the Dean of Students exercises the authority to withdraw registration immediately from any student organization.

Statement on Registration of New Social Fraternities and Sororities

Social fraternities and sororities wishing to establish or re-establish a chapter at Northern Arizona University must comply with the expansion policies and processes set forth by the Office of Fraternity and Sorority Life in accordance with the College Panhellenic Council, the Inter Fraternity Council, and/or the United Greek Council. Expansion involves inviting inter/national fraternities and sororities to establish chapters at Northern Arizona University. This is encouraged when a need exists and the Greek community is viable for additional chapters. Social fraternities and sororities must be approved to move forward with the expansion process by the Office of Leadership & Engagement before they can register with the Office of Student Life and be approved as a registered student organization.

Only inter/nationally recognized fraternities and sororities may be considered for expansion. The organization of interest must have a national office supported by fulltime staff members (or a national board).

The organization of interest must prohibit simultaneous membership in any other organization that is a member of the NPC, NPHC, NALFO, NMGC, NAPA or NIC.

Statement on Registration of New Sports Clubs

Student organizations that meet the following criteria must be classified as a Sport Club:

- Consist of a sport component
- Competitive in nature
- Physically active
- Ability to compete against similar groups at other institutions within a reasonable geographic area
- Abide by rules set forth by a national governing body for that particular activity

If a student organization meets the above criteria and chooses not to be classified as a Sport Club, they will not be recognized as a registered student organization at Northern Arizona University. No organization shall be duplicated as a student organization if a sport club is already offered for that activity.

Groups wishing to identify as a Sport Club must be recognized by the NAU Sport Clubs Program. In order to establish a new Sport Club groups must

- Confirm there are no existing sport clubs/student organizations that offer the same activity
- Complete the [New Sport Club Application](#)

- Meet with the Sport Clubs Coordinator to discuss program expansion
- Present to the Sport Clubs Executive Board
- Complete the True Blue Connects registration form

After these steps are completed the group may register as a new student organization with the Office of Leadership & Engagement.

Privileges of Registered Student Organizations

Registered student organizations that maintain an active status have the privilege of:

- 1) Using the University's name, as long as the word "club" or "student organization" also appears in the organization's name (i.e. NAU Volleyball Club, NAU Forestry Club) or the University's name is used to designate
- 2) location (i.e. Art Student Association of NAU, Hillel at NAU).
- 3) Applying for organizational funding from Associated Students of NAU (ASNAU), Alumni Engagement, STudent Activities Council (STAC), and Sodexo.
- 4) Utilizing University facilities, including weekly meeting space.
- 5) Hosting/sponsoring events and activities on campus
- 6) Sponsoring candidates in campus events, forums, and elections.
- 7) Requesting Institutional Excuses for extracurricular activities directly related to the educational mission and scope of the University
- 8) Recruiting new members from among the NAU student body.
- 9) Participating as an organization in Associated Students of NAU sponsored events
- 10) Access to resources and event materials at ASNAU's Club Headquarters

TRUE BLUE CONNECTS

Northern Arizona University uses an online student organization system called

[True Blue Connects](#). This is a tool for student organization leaders to keep track of updated organization registration, add members, and update other information such as meeting times and membership dues. All current NAU students have access to True

Blue Connects and are eligible to have administrative privileges for their student organization –at least one student, usually the President, is automatically a group administrator and can assign that status to any other members. Student Organizations can use True Blue Connects as a marketing tool for recruitment and events, and a way to keep information organized.

Current and prospective students, faculty, staff, and visitors can also access True Blue Connects to search for student organizations. Information visible to the public includes the names of the President and Adviser, contact information for the group, and meeting times, if available.

True Blue Connects also gives student organizations the ability to connect to Facebook and Twitter, upload photos, and create news articles about their activities. Please note that all photos and posts are visible to University staff members and any reference to illegal or prohibited activities may result in University sanctions. Remind your officers and members to use good judgment when adding information to their True Blue Connects profiles.

Finally, True Blue Connects is also where organizational leaders register all events, meetings, and gatherings for the club. This allows the appropriate teams to support your event planning, help you book meeting space, contract with vendors, and much more. All club activities should be registered no later than 7 days in advance.

STUDENT ORGANIZATION OFFICERS

Northern Arizona University student organization policy requires that all student organizations have at least two officers. In addition, all officers must be registered for at least 7 hours at NAU and must have a cumulative GPA of at least 2.25. The Office of Leadership & Engagement staff members check these requirements each semester and contact those officers who have not fulfilled them.

Each student organization determines how many officers are needed and what titles are used. Below is a list of typical officers and suggestions for what their duties may include. This is by no means a complete list and your organization may decide to divide officer responsibilities differently. Officer roles should be laid out in the organization's constitution. If you are unsure of what is expected of you as an officer, ask your adviser, previous officers, fellow officers, or the Office of Leadership & Engagement for guidance.

The Role of the President

- Preside over meetings of the organization
- Call special meetings as needed
- Maintain contact with adviser, affiliated University department or community partner, and/or national organization
- Represent the organization to the University and at official functions
- Serve as secondary signer on bank accounts
- Assist and support all other officers
- Coordinate officer transition process
- Provide encouragement and motivation to officers and members

The Role of the Vice President

- Assume the duties of the President in their absence
- Facilitate election and training of officers
- Coordinate recruitment efforts
- Maintain constitution and other organizational documents
- Coordinate recognition and awards

The Role of the Secretary

- Keep a record of all members
- Keep a record of all activities
- Take and distribute minutes of each meeting
- Notify members of meetings and events
- Maintain organization's calendar
- Handle all official correspondence (mail, email, etc.)

- Keep members informed about organization and University business
- Maintain organizational files and records

The Role of the Treasurer

- Keep all financial records
- Serve as signer on bank account
- Be familiar with financial policies and procedures
- Collect dues and pay bills
- Prepare budgets
- Prepare and submit funding requests
- Advise members on good financial practices
- Coordinate fundraisers

Chairs & Co-Chairs

Chair and Co-Chair positions usually fall underneath other officers and are task specific. Some examples include Social Chair, Recruitment Chair, Community Service Chair, Marketing Chair, and Special Events Chair.

Other Officers

Other officers might include Parliamentarian, Sergeant-at-Arms, Marketing/Public Relations, Historian, Webmaster, etc. Organizations may have as many officers as they wish and as make sense within the scope of organizational business. Keep in mind, however, officers may withdraw if they begin to feel they are overburdened or they don't have enough to do. Try to maintain a balance of duties between officers and be sensitive to your members' time and other commitments.

Officer Transitions

Too often, organization leaders dedicate themselves to successfully leading their groups for an academic year and at the end of their terms, leave the positions without time spent making sure the incoming officers have the opportunity to be trained. When that happens, all the information regarding the previous year's lessons learned are not passed on to the incoming officers, thus slowing down their progress. Without taking the time to effectively transition incoming officers, organizations lose the opportunity to continue momentum gained in the previous year. Time that could be used moving the organization forward and accomplishing new goals is spent catching up.

In addition to gathering information for the new board members, the outgoing officers should tie up any loose ends in their position. Use this list of suggestions to ensure all necessary items have been completed:

- ✓ Coordinate new officer election/selection. Refer to your organization's constitution and/or bylaws for processes and procedures. After new officers are selected, update your roster with the new officer and membership list.
- ✓ Organize all notes, files, and electronic documents. Transfer access to group email, website, bank account, etc.
- ✓ Finish all necessary correspondence (letters, e-mail, phone calls).

- ✓ Complete re-registration for the next academic year.
- ✓ Develop an action plan and timeline for new officer transition, including but not limited to:
 - Necessary meetings attended and conducted by officer
 - Important tasks
 - Sharing tasks and duties with other group members
 - Introductions to key people / relationship building
 - One-on-one meetings and training
 - Financial information
 - Mandatory training for new presidents and treasurers
- ✓ Complete and share outgoing and incoming officer worksheets
- ✓ Schedule a joint meeting or retreat between outgoing and incoming officers to go over necessary information and goals for the upcoming year.
- ✓ Make sure all outstanding bills or invoices have been paid. If any are in process at the time of transition, write a memo to the new officer noting what is complete/what needs to be done with them.
- ✓ Allow incoming officers to shadow outgoing officers. Create an officer transition binder (see below for suggested list of what to include), and share any documents with the new officers.

Creating Officer Transition Binders

To assist with transition, officers should keep important files and documents throughout the year and organize them in a binder or in an electronic format like a flash drive to hand off to the new officer. This should be customized for the needs of the organization and each individual position but here are some suggestions for what to include:

- Organizational mission statement
- Organizational constitution and/or by-laws
- Organizational policies and procedures
- Constitution and/or by-laws and contact information for larger national organization and/or governing organization (PHC, IFC, etc.)
- Officer position descriptions
- Year-end reports and evaluations
- Organizational calendar
- Information about annual or traditional events
- Budget information
- Bank account information and Tax ID number
- Organizational goals (both met and unmet)
- Specific officer/position goals
- Agendas and meeting minutes
- Committee reports

- Important names and numbers (contact list)
- Pertinent correspondence
- Resource list
- Important forms
- Names and contact information of outgoing officers
- Unfinished project information
- Dos and don'ts, helpful hints, and lessons learned

Officer Transition Meeting Outline

Before the newly elected officers of your organization officially assume their responsibilities, it is a good idea for the old and new officers to get together for a transition meeting. Such a transition meeting provides continuity and continued growth for the organization while allowing the new officers to learn from the experiences of the outgoing officers. A casual, open atmosphere should be encouraged so the organization can benefit from an honest evaluation of the accomplishments and issues of the previous year. The following is one suggestion of an outline to help make the transition meeting flow as smoothly as possible.

- I. Welcome and Introductions
- II. The Year in Review
 - a. Goals: Review the group's goals for the previous year
 - i. What did we hope to accomplish?
 - ii. How well did we do on each goal?
 - iii. What goals should be continued this year?
 - iv. What goals need to be changed?
 - v. What goals are no longer feasible?
 - b. Events and Activities: Evaluate what your group did
 - i. How successful were the events / activities we sponsored?
 - ii. How did we measure their success?
 - iii. Did we have a good balance in our schedule of events and activities?
 - iv. Were our events and activities consistent with our goals?
 - v. What activities and events do we want to repeat?
 - c. Membership: Evaluate number of members and their commitment
 - i. Do we have too many, too few, or just the right amount of members?
 - ii. What actions did we take to recruit members?
 - iii. Were our recruitment efforts successful?
 - iv. Are our members as actively involved as we want them to be?
 - v. What were the opportunities for members to get involved in a meaningful way?
 - d. Officers and organizational structure: Evaluate officers and structure



- i. Are officer roles and responsibilities clearly described?
 - ii. Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
 - iii. Is the time and effort required in each position comparable?
 - iv. Is there two-way communication between officers and members? How do the members feel about the officers?
- e. Organizational operations: Evaluate finances, communication, etc.
 - i. Were the finances adequate for our group and managed properly?
 - ii. Were meetings run effectively? Was their frequency adequate?
 - iii. Did the committee structure work?
 - iv. Did we have scheduling conflicts with other groups or activities?
- f. Adviser involvement: Evaluate both quality and quantity
 - i. Did our advisor provide the support we needed?
 - ii. Did we give our advisors and other faculty a chance to get involved?
 - iii. How could we improve faculty and advisor involvement?
- g. Public image: Evaluate how other groups perceive you
 - i. How do we see ourselves?
 - ii. Is this how “outsiders” see us?
 - iii. How can we enhance our image?
- III. Your Legacy to the New Officer Team
 - a. What are the current strengths and weaknesses of the group?
 - b. What is the best advice you can give your successor?
 - c. What were there major challenges and accomplishments in your term?
- IV. Officer Transition (Have the new and outgoing officers meet individually to discuss)
 - a. Responsibilities of the position, with a job description
 - b. A timetable for completion of annual duties
 - c. Unfinished projects
 - d. Important contacts and resource persons
 - e. Mistakes that could have been avoided
 - f. Advice for the new officer
 - g. Any questions the new officer may have
 - h. Where the outgoing officer can be reached with future questions
- V. Wrap-Up
 - a. “Pass the gavel” in a semi-official ceremony in front of outgoing and incoming board and wish everyone luck
 - b. Provide an opportunity for informal socializing

STUDENT ORGANIZATION ADVISERS

Choosing an Adviser

The Office of Student Life requires all registered student organizations to have an adviser who is a full-time employee of the university. Advisers are selected by the members of the student organization, usually based on shared academic discipline or interests or because one of the students has an established relationship with that faculty or staff member. Occasionally the Office of Leadership & Engagement can assist students with finding a suitable adviser.

In some cases, student organizations may wish to have a graduate student or a person who is not directly affiliated with the University such as a coach or campus minister serve as an adviser. This is fine as long as the group also has a full-time faculty or staff member who will be the adviser of record. Multiple advisers can be chosen and listed in True Blue Connects.

Adviser Requirements and Responsibilities

There are few hard and fast requirements for student organization advisers. The adviser's name and contact information must be listed in True Blue Connects—this information will be publicly available and the adviser may be contacted by interested students. The adviser is also required to sign off on university forms such as institutional excuse requests or the Event/Activity Request form provided by Student Unions and Activities for student organizations wishing to coordinate or sponsor events on campus.

In addition to these required roles, there are other important responsibilities that we encourage advisers to take on:

- Be present at student organization meetings and events as often as possible.
- Be aware of the student organization's activities and provide guidance as needed.
- Be aware of the student organization's financial situation.
 - Know where student organization bank accounts are held.
 - Understand what funds are coming in and going out and help students manage money responsibly.
 - Know who the official signers are for the account and know the
 - account number.
 - We recommend that the adviser's name be added to the account if the organization establishes an off-campus bank account. This has proven to be especially helpful during officer transition periods.
- Help the student leaders set goals for their organization.
- Assist with problem solving and conflict resolution.
- Keep historical information and records for the group and share knowledge with members.

Working with Your Adviser

The responsibility for building a relationship should be shared between the adviser and the members of the student organization. This relationship is a partnership that should be based on open, direct communication. Both the adviser and your members should share their needs, responsibilities, and expectations with each other—it's a great idea to meet with your adviser at the beginning of the year to go over this and your plans for the year.

This mutual relationship between the adviser and the student organization should be reviewed periodically to make sure it is still working for all parties. Understand that your adviser's availability and other commitments may change over time as can the needs of your organization. At times an adviser may have a need to step back from that role and they are free to do so. Student organizations are also free to seek out a new adviser if they feel their current adviser is not able to provide the support they need. Any adviser changes should be made in True Blue Connects and communicated to StudentOrgs@nau.edu.

RESOURCES FOR STUDENT ORGANIZATIONS

Mailboxes

Student organizations often need to provide a mailing address for organizational business such as bank accounts, journal or magazine subscriptions, national organizations, or other activities. Most commonly, student organizations use a departmental address, their adviser's address, or the general student organization address. We recommend using one of these options rather than an individual member's address to maintain consistency from year to year and ensure that important items do not get lost as members leave the group or graduate.

ASNAU provides mailboxes in their office for every student organization that would like one. Please stop by the ASNAU office to get a mailbox set up for your group.

All student organizations use the same mailing address for these mailboxes:

Organization Name
PO Box 6036
Flagstaff, AZ 86011

Mail sent to this address is delivered to the ASNAU office where it is sorted into individual mailboxes. It is the responsibility of each organization to check and pick up their mail regularly. To pick up your mail, check in at the desk in the ASNAU office where you will sign a log indicating your name and what organization you are picking up mail for. If you receive a large item or your mail starts to pile up, ASNAU may contact you to remind you to pick up your mail. All uncollected mail is typically thrown out over the summer after a final attempt at contacting student organizations.

Websites and Email

The main website for student organizations is through True Blue Connects. Each organization's home page has a unique URL which will point visitors directly to that page. Groups can customize the page's font and colors as well as adding a cover picture. This page is the official university record for your organization and should be kept as up to date as possible.

Students and student organizations can create web pages using Google Sites which is a web hosting program connected to your NAU Gmail services. For instructions on how to use Google Sites, check out the ITS [website](#).

Student organizations may also choose to utilize Facebook, Twitter, Instagram, or other web hosting programs to create an online presence for the group. You may provide links to these external sites on your True Blue Connects page.

Student organizations may also wish to set up a shared email address for organizational business. Many groups do this using free services such as Gmail, Yahoo, or Hotmail. Some groups also wish to request an nau.edu email address for the group. Any faculty or staff member can request a shared email address so the request should be made by your adviser. Any number of faculty, staff, and students can be given access to the mailbox and management can be easily transferred to a different individual if needed. Shared

mailboxes are great for student organizations because the mailbox remains unchanged, including any saved messages, sent items, etc. when a new individual logs in to read or respond to email. In addition, the address can be personalized to reflect your group's name—myclub@nau.edu for example. To learn more or request a shared mailbox, contact ITS at 928-523-1511 or ASK-its@nau.edu.

When you create an organizational website or email address, be sure that more than one member of your group knows how to access the account. If the person with primary responsibility for the account leaves the group, be sure to get all pertinent information from them so you do not lose access to your website or email.

Club Headquarters

Club Headquarters is located in the ASNAU Office, Room 206 of the University Union. Through Club Headquarters ASNAU provides supplies and services to registered student organizations. Supplies available at no charge include balloons and a helium tank, an Ellison press for making letters and shapes, butcher paper, colored paper, and markers. Club Headquarters also has printing and copying services available. To make use of this resource just stop by, sign in, and get to work!

- Butcher paper—unlimited
- Balloons and helium—6 dozen per semester
- Black and white copies—75 per day
- 11x17 posters and colored printing—50 copies per event (3 events per semester)
- Paint pots—unlimited
- Ellison press—unlimited
- Laminations—20 per semester

Other supplies available for use within club headquarters: scissors, sharpies, glue, glue sticks, hot glue gun, staples, tape, paper clips, rubber bands, cutting board, rulers and a table.

Club Headquarters is open during the fall and spring semesters. The hours are Monday through Friday from 9:00am-4:00pm. Contact Club Headquarters via email at chq_manager@nau.edu

Lumberjack Club Fair

The Lumberjack Club Fair is held during Welcome Week at the beginning of the fall semester and at the start of the Spring semester. The fair is a chance for all registered student organizations to increase their membership by reaching out to new and returning students. The Office of Leadership & Engagement staff contacts registered student organizations about signing up during the summer months, but feel free to contact the office if you would like to be involved in this event.

UNIVERSITY POLICIES

Student organizations are expected to abide by all University policies and regulations. The policies in this section are especially important for officers and members of student organizations to note.

Registered student organizations, as well as their members, may be held collectively and/or individually responsible for violations of the Student Code of Conduct, Hazing Policy, or other university policies. The Office of the Dean of Students can take action according to the Code even if a student organization and/or its governing body has already implemented its own disciplinary process and/or sanctions. If it is determined that a student organization, group or member did violate university policy, the following sanctions may apply (this is not an exhaustive list):

- Suspension of the organization as a registered student organization
- Loss of campus privileges for the student organization
- Restitution for damages that may have resulted from the incident (student organization and/or individual)
- A warning may be issued (student organization and/or individual)
- A probationary period may be implemented (student organization and/or individual)
- An individual may be suspended from the university
- An individual may be expelled from the university

Northern Arizona University Student Code of Conduct

The [Student Code of Conduct](#) applies to individual students and to student organizations. Student organizations may be charged with violations of the Student Code of Conduct to the same extent as students. We encourage you and your members to become familiar with the Student Code of Conduct as violations can have ramifications regarding the status of your organization.

Northern Arizona University Hazing Prevention Policy

As stated in the [Hazing Prevention Policy](#), Northern Arizona University cannot and will not tolerate any act of hazing associated with registered student organizations, groups of students affiliated with the University, or individual students. Students and Student Organizations that engage in Hazing are subject to disciplinary action and sanctions up to and including expulsion or de-registration.

Institutional Excuses

Registered student organizations may request an [institutional excuse](#) if members will need to miss class for an organization-sponsored activity. Requests are typically approved for attendance at conferences, sport club competitions, or field trips that are related to the academic mission of the organization and the university. Institutional

excuses are not approved for community service, social, or recreational events—student organizations are expected to plan these types of activities around classes and other academic obligations.

Student organization members wishing to be granted an institutional excuse should submit the [extracurricular institutional excuse form](#) to the Office of the Dean of Students at least two weeks before the date(s) of the missed classes. If approved by the Office of the Dean of Students, the institutional excuse must be presented to instructors at least 5 working days (one week) before the absence. The Office of the Dean of Students will not approve and instructors are not required to honor institutional excuses submitted after this time period.

Finals Week/Final Exams Policy

NAU is committed to the academic success of our students. The [Final Exams](#) policy has been developed to ensure that students are not overly burdened at the end of the term with non-academic activities and to ensure that final exams are administered as specified on the Registrar's Office Final Exam Schedule. Finals Week refers to the last week of the term, and the dates are defined in the Registrar's calendar. This policy applies to both graduate and undergraduate programs and applies to regular 16-week and short-format classes that end during Finals Week.

With regard to student organizations, the Final Exams policy states:

"Student groups and organizations are not to schedule concerts, major social events, or any activity that might conflict with academic studies or finals, except on weekends. Events scheduled by parties external to the university that require attendance by NAU students are exempt from this policy."

The Office of Leadership & Engagement interprets this policy to mean student organizations may not hold events during Finals Week.

Weapons Policy

The NAU [Weapons on Campus](#) policy defines a weapon as follows:

"Weapon" refers to any object or substance designed to (or which could be reasonably expected to) inflict a wound, cause injury, incapacitate, or cause death, including, without limitation, all firearms (loaded and unloaded, simulated and real), devices designed to expel a projectile (such as BB guns, air guns, pellet guns, and potato guns), swords, knives with blades of 5 inches or longer, martial arts weapons, bows and arrows, and chemicals such as tear gas, but excluding permitted Personal Safety Devices.

Use, possession, display, or storage of any weapon is prohibited on all property and facilities owned, leased, or otherwise under the University's control, and at all University activities or events wherever located. Prohibited items include firearms carried with a permit and live ammunition. There are a few exceptions which are outlined in the policy.

Non-compliance will result in university disciplinary action and may also result in criminal charges. A club, organization, or program may request a temporary exception to the weapons policy for use of a weapon or a simulated weapon by submitting the [Weapons Prohibition Temporary Exception Request Form](#) to Student Unions and Activities at least fifteen working days (three weeks) prior to the intended date of such use, possession, display or storage of a weapon or simulated weapon for approval by the



Chief of Police.

Registered student organizations that plan to host on-campus practice sessions involving weapons, perform celebratory traditions utilizing real or fabricated weapons, or who use real or simulated weapons as integral to their activity must comply with the following:

- Locate and reserve a designated and approved facility or space.
 - Events utilizing real or simulated weapons and designated for “the entire campus” will NOT be approved.
 - Spontaneous or informal gatherings of such clubs cannot be approved.
- Annually file and have approved a *Weapons Prohibition Temporary Exception Request Form* by the NAU Chief of Police.
- Not utilize on-campus storage (including Residence Hall rooms) of personally owned weapons as this will not be permitted.
 - This includes even “toy-like” weapons such as neon-colored nerf guns, light sabers, etc.
- Any personal weapon used in on-campus events and competitions must be transported in an appropriate, lockable carry case.
- All weapons (real and fabricated) owned by a department or program must be stored in a secured location approved as part of the Weapons Prohibition Temporary Exception Request Form process. Gasoline must be appropriately stored and used in a properly ventilated area.

EVENT PLANNING

Event/Activity Approval Request Form

Off Campus Events

All events, meetings, and gatherings for student organizations need to be registered in True Blue Connects a minimum of 7 days in advance of the activity. Off campus events provide an opportunity for clubs to connect with the Flagstaff community. When the event is registered, the Office of Leadership & Engagement will review. This helps you plan your event, mitigate risk, and allows for us to be in the know regarding club experiences.

On-Campus Events

All student organizations that wish to hold an event on the NAU campus must seek approval for that event from the Office of Leadership & Engagement and Student Unions and Activities. To start the process, organizations must fill out and submit the Event/Activity Approval Request form online through True Blue Connects **at least seven (7) business days prior to the start of the event**. To access the event form on True Blue Connects, please follow these steps:

- A. You must be listed on the roster and designated as an officer in order to have access to and submit the form—if you are not you will need to talk with your
- B. President to get the roster fixed or contact the Office of Leadership & Engagement if the
- C. President is not up to date. Advisers cannot submit event forms.
- D. Go to [True Blue Connects](#) and log in using the blue button at the top.
- E. Click on the name of your organization under “My Memberships” on the main page.
- F. Click the “Manage Organization” button at the top right of the screen.
- G. You will see the name of your organization on the top left with a menu icon (three horizontal bars) next to it. Click the menu icon and then choose “Events” from the left menu that will pop up.
- H. Click the blue button that says “Create Event” on the top right to fill out the form and submit request.
- I. Student Unions and Activities staff will email you a confirmation that they have received your Event Approval Request Submission. If you do not hear from them within 48 hours please feel free to contact them to follow up at 928-523-4313 or unions@nau.edu.

Off Campus Event Review

- Club representative submits event request in True Blue Connects one week in advance of event.

- Included in request is an upload of the confirmed off campus reservation
 - Examples: contract, email reservations
- If alcohol and other legal substances are present and club is utilizing third-party vendor:
 - Club will submit third-part vendor contract
 - Will need to include: food provided, non-alcoholic beverages included, wrist bands
 - Club submits risk management plan
- If event is greater than 50 miles from Flagstaff, [travel documents](#) must be submitted
- Student Organization office will review and approve
- If FSL club, Student Organization office reviews and FSL team approves

Off Campus Event Approvals

Per the NAU Student Code of Conduct, off-campus conduct that a reasonable person would believe may present a risk or danger to the health, safety or security of the university community or property is not permitted.

Per NAU policy, when operating in official university capacity we expect behavior at events to be consistent with the [NAU Student Code of Conduct](#).

NAU does not endorse off campus events where alcohol and other legal substances are present without a third-party vendor. The expectation is a third-party vendor will provide appropriate oversight, risk management, and guidance to ensure safety and adherence to federal and state laws.

Resources and City Ordinances

- www.codepublishing.com/AZ/Flagstaff/html/Flagstaff06/Flagstaff0608000.html
- nau.edu/aod
- nau.edu/campus-health-services/substance-use-disorder-program
- nau.edu/studenthandbook

Student Unions and Activities is located in room 111 of the University Union and is open Monday through Friday from 8:00 am to 5:00 pm during the regular academic semester. Staff members are available to assist student leaders in planning their events and collecting the necessary permissions and documentation including locating and reserving space on campus. The Event/Activity Approval Request form asks for information about the event including the name of the student organization, contact information for the student organizer and adviser, the name of the event, the proposed date and time, and a brief description of the event or activity.

Please be as specific as possible, since Student Unions and Activities staff use this form to determine the following:

- The best available location for the event

- Approval from the student organization advisor
- Approval from the Office of Student Life
- Approval from Fraternity and Sorority Life, if applicable
- Which other offices they will need to contact for additional approvals such as Facilities, Campus Dining, Central Ticketing Office, and the NAU Police Department
- Contracting and insurance needs
- If a meeting is required with the student organization event organizer to go over details

Once Student Unions and Activities receives all necessary approvals and documentation for processing, a staff member will review everything and determine if the event is approved or denied.

Please keep in mind: some events, especially those involving insurance and contracts, can take several weeks to process. If an event form is not submitted at least five (5) business days before your event, it is unlikely to be approved. **Your event is not approved and finalized until a staff member from Student Unions and Activities has approved the event form in True Blue Connects; moving forward with an event that is still pending or has been denied will result in an evaluation of your student organization's standing with the university.**

If you have any questions about whether an event or activity needs to be approved by Student Unions and Activities, please don't hesitate to contact a staff member in the office.

Sponsorship by Third Parties

Occasionally student organizations want to work with third parties such as local businesses or vendors to co-sponsor an event, items, food, etc. Student organizations should approach these partnerships thoughtfully and make sure that both parties are benefiting from the arrangement. Even if a third party sponsor is involved in an event, the registered student organization sponsoring the event ultimately remains responsible for ensuring that university policies are adhered to and all expenses associated with the event are paid in a timely manner.

Student organizations may face sanctions or consequences for policy violations at sponsored events even if the violation resulted from actions of a third party. Student Unions and Activities and the Office of Leadership & Engagement will review proposed event sponsorships prior to final approval of the partnership. In general, if you cannot possess or use a business or vendor's product on campus, that business or vendor cannot sponsor a student organization event. Examples include, but are not limited to alcohol, tobacco products, weapons, pets, and food or beverages prohibited by university contract rights.

Student organizations should consult with the Office of Leadership & Engagement with all sponsorships, contracts, agreements, etc.

Working with Campus Dining

Northern Arizona University Campus Dining has an exclusive contract for food service on the Flagstaff campus. If you are planning an event where food will be served at the Mountain Campus, you must contract with Campus Dining to prepare and provide the food. Campus Dining recognizes that student organization events are held on a tight budget and they do offer catering options designed to be easier on your budget. The catering menu can be found [here](#).

Campus Dining recognizes that occasionally there are circumstances where using their services is not cost effective, or that they cannot supply the items requested. In these cases, student organizations can request a waiver of the food service requirement. Waivers may be granted if the food to be served cannot be provided by Sodexo, is pre-packaged and sealed, if there is no charge to attend the event, and if food will not be sold to participants. Waivers will not be granted if the food to be served can be supplied by Sodexo, is to be prepared at home, or needs to maintain a certain temperature. Forms to request food service waivers are available online under [Quick Forms](#), and must be submitted at least two weeks prior to the event.

The above policy is to ensure that those persons attending the event are protected from illness caused by improperly prepared or stored food and that NAU Campus Dining, Northern Arizona University, the Arizona Board of Regents, the State of Arizona, and the entity sponsoring the event are protected against liability.

Campus Dining is able to provide vegetarian, vegan, and Halal meals. They are also able to provide some kosher items, but at this time they do not have a kosher kitchen to prepare hot meals. If your student organization has questions or special needs, please contact Student Unions and Activities or Campus Dining to discuss them.

Please note: once you complete a catering contract, **you may be eligible to apply for programming funding**. When you complete your order online, you can indicate "Programming" as your method of payment. You will also need to complete an application for programming funding which is available through Student Unions and Activities and must be turned in at least five business days prior to your event. Each student organization may be granted up to \$250 once each semester towards catering expenses, so be sure to plan accordingly. Learn more about funding options for Student Organizations at nau.edu/dean-of-students/student-organization-funding.

Contracts

Prior to entering into any contracts or agreements with third parties (e.g., speakers, performers, equipment rentals, etc.), please first consult with the Office of Leadership & Engagement in order to ensure proper steps are taken. Student organization officers, members, and/or advisers SHOULD NOT sign any contract with a person or business committing university funds until the proper review is completed. You can begin this process with the event form in True Blue Connects.

Policy on Off-Campus Speakers

An invitation to an external or off-campus speaker to speak on the university campus may be made at the request of any registered and recognized student organization. The

university may authorize the requesting organization to contact the speaker and extend the approved invitation to speak. The fact that the speaker may be provocative and strike at prejudices or preconceptions and may hold views contrary to and disliked by the campus and the surrounding community is not a permissible basis for the denial of the right of the faculty or student organization to hear them.

For more information please see the [Statement Regarding Planned Events](#).

Showing Movies

Student organizations that wish to show movies on campus need to secure public performance rights for protection against copyright infringement. You need to get clearance or a license if your showing falls into any of these situations:

- The screening is open to the public (including open to members of the campus community)
- The screening is in a public place where access is not restricted
- The people attending are outside a normal circle of family and friends (including showing a film to a student organization)

These regulations apply even if the film has cultural or educational value. Public performance rights are normally valid for one showing of a movie—they do not provide perpetual viewing rights. Student organizations who wish to show a movie on campus must secure these rights and provide proof to Student Unions and Activities before the event is approved.

We suggest that student organizations work with [Swank Motion Pictures](#) to secure films and licenses.

Student organizations are responsible for all costs associated with their films and must also assume all the responsibility for acquiring these rights and the film(s). Student Unions and Activities staff are happy to assist with this process.

Ticketed Events

Depending on the nature of an event, admission fees may be charged for entry. As per NAU Comptroller Policy 306, any NAU-sponsored event held on campus where an admission fee is required, the event must be ticketed through the Central Ticket Office (CTO). An authorized SIGA signer must sign the Event Set Up Form on behalf of a student organization. Please refer to the FY20 Fee Structure below to learn more about the CTO fees and procedures.

All ticketed events will be subject to the Event Set Up Fee and the Per Ticket Fees. Any additional fees will be assessed according to the FY20 Fee Structure. These fees will be collected from the total revenue from ticket sales. The remaining revenue will be distributed to the student organization following the liaison's acceptance and approval of the event settlement.

If the student organization is not charging an admission fee, but would like to use the CTO for control or to track attendance, only the Event Set Up Fee will apply.

FY20 Fee Structure

Effective Date: 7/1/19

*(Subject to change, please consult with the Central Ticket Office Manager)***FEE TABLE:**

Fee Type	Fee	Cost to
Event Set Up Fee	\$100.00	Promoter
Per Ticket Fee	\$2.00	Customer
Convenience Fee	\$2.00	Customer
Order Fees	\$3.00	Customer
Labor Fees	\$15.00/hour per CTO worker	Promoter
Facility Fee	Varies	Customer
Ticket Reprint Fee	\$2.00	Customer
Change Fee	\$25.00 - \$100.00	Promoter
Comp Ticket Fee	.15	Promoter

FEE DESCRIPTIONS:

Event Set Up Fee: Covers software licensing, event creation in ticketing software, cash handling, event reconciliation/close outs, and two (2) CTO workers (1 seller, 1 manager) for up to two (2) hours on the day of the event.

Per Ticket Fee: Covers credit card fees, IT fees, per ticket fees paid to ticketing system vendor, website promotion, and hardware maintenance.

Convenience Fee: Covers labor/customer service and material costs associated with “in-person” (box office, door, and phone order) ticket sales. Promotes usage of online resources.

Order Fees: Covers materials/office supplies (i.e. envelopes, postage, and phone lines).

Labor Fee: Covers cost of ticket sellers and managers at events above what is provided in Event Set Up fee (two CTO workers for up to two hours on the day of the event), including special on-sale events.

Facility Fee: Per ticket fee charge dictated by venues.

See Facility Fee table below.

Venue	Facility Fee
Ardrey Memorial Auditorium	\$1.50
Ashurst Auditorium	\$1.00
Clifford E. White Theater	\$1.00
Cline Auditorium	n/a
DuBois Center	n/a
Field House	n/a
Kitt Recital Hall	\$1.25
LumberJack Stadium	n/a
MAC Gym	n/a
Prochnow Auditorium	n/a
Rolle Activity Center	n/a
Studio Theater	\$1.00
Walkup Skydome	\$2.00 (varies)

Ticket Reprint Fee: Covers costs associated with reprinting lost, forgotten or stolen tickets. This would not incur an additional convenience fee.

Change Fee: Fee to promoters for changes to event set up requiring additional resources.
See change fee schedule below.

Change requested – per event/performance	Change Fee
Change of Venue	\$100.00
Change of Time/Date	\$25.00
Change of Prices (once tickets have been sold)	\$100.00
Change of Prices (before tickets have been sold)	\$25.00
Seating Type Configuration (GA vs. Reserved)	\$100.00
Change in Labor (number of ticket sellers requested)	\$25.00

Comp Ticket Fee: Covers labor and materials required to print, package no cost tickets.

Planning Inclusive Events

When planning events, it is important to be mindful of the differences of the people in the community. Creating an inclusive environment allows more people to feel welcome. Answering this question will assist in creating an inclusive environment: “Whose perspective, experiences, viewpoints, and voices are included?” The following suggestions can help guide student organizations toward events that inclusive of and welcoming to the entire university community.

Religious Backgrounds, Rituals, and Traditions

- The United States, along with its practices and traditions, have been heavily influenced by Christianity. Be aware of how these beliefs have been engrained in actions and ways of thinking, especially around the beliefs of other people

- Does the event coincide with specific religious observances that may exclude some community members?
- If you have food at the event will participants of diverse religious traditions be restricted from eating it?
- Will there be food at an event when certain students are fasting due to religious commitments and beliefs?
- In the month of December will you have a Christmas party (while not acknowledging the other religious and cultural celebrations during the month)?

Economic Limitations

Do not assume that everyone can afford to attend the program or event.

- Is there a cost to attend the event or some parts of the event?
- Is there assistance available for students who cannot afford to attend?
- Is the event off-campus, requiring transportation?

Diverse Sexual Identities

Do not assume all participants will have the same identity as you.

- Does the advertising and dialogue before and at the event assume that all participants will be heterosexual? (For example, do marketing materials for the dance state that same sex couples will be welcome?)
- Are pictures on your flyer, website, or social media only of heterosexual couples?

Gender Bias and Gender-Neutral Language

Western society often assumes that men are supposed to act one way and women another. Additionally, do not assume that you can tell a person's gender or gender identity by looking at them.

- Did you assume that only men in your community would be interested in participating in intramural football?
- Did you assume that only women will be interested in doing a craft project?
- Does any aspect of your event require participants to separate into categories based on gender?
- Does the registration form have a space for participants to indicate the name or nickname they would like you to use on nametags? Preferred gender pronouns?

Diverse Racial and Ethnic Populations

Do not plan an event as if the people in attendance will only be of one particular racial and/or ethnic group.

- Will the event attract people of different races and/or ethnic groups?
- Will the event affirm (or demean) people of diverse racial and/or ethnic groups?
- Do the advertisements indicate, with words or pictures, that the event will be open to and appreciated by people of different racial and/or ethnic groups?
- Will the theme, costumes, decorations, or other part of the event be perceived as offensive or culturally insensitive?



Participants with Disabilities

Do not assume that all community members are (temporarily) able-bodied.

- If the event includes a speaker will there be an American Sign Language interpreter available? Will films have captions?
- Is the location accessible for those who use wheelchairs or have other mobility impairments?
- Is the font on flyers or handouts large enough for individuals with visual disabilities?
- Are electronic materials such as flyers, websites, and registration forms accessible for people using screen readers or other assistive technology?
- Is information provided about how to contact the event organizers for accommodations?

MARKETING AND PUBLICITY

One of the keys to recruiting members for your organization or planning a successful event is a good marketing strategy. There are a lot of resources on campus that you can utilize to get the word out about your organization and its activities.

Tabling

There are vendor booth spaces available in the Union, DuBois Center, and Health and Learning Center as well as designated spots outside these buildings where student organizations can advertise events or pass out information. These must be reserved in advance through the True Blue Connects event request form and may require an Event/Activity Approval Request form depending on the nature of the advertising students wish to do. Student organizations may not pass out materials or solicit donations anywhere else inside the Union, HLC, or DuBois Center. In addition, individuals must not block building entries and exits, walkways, or streets. The student organization is responsible for cleaning up any litter or associated mess that is related to distribution efforts.

Student organizations may be allowed to pass out materials or set up tables in academic buildings or residence halls with the permission of the Building Manager or Residence Hall Director. A True Blue Connects Event Request must still be submitted and approved.

Flyers

Student organizations may utilize the bulletin boards at the University Union and Du Bois Center, including the boards next to the Office of Leadership & Engagement and outside of the ASNAU Office. Posters and flyers must be taken to the Information Desk in the Union for approval and posting; if you put them up on your own, they **will** be taken down. Each desk will take up to three of your advertisement. They can be posted for up to two weeks before being removed.

There may be sites to post flyers or other information in other buildings across campus. Please check with the individual building managers or main offices to determine whether posted information must be approved ahead of time.

All advertisements, posters, flyers, etc. must include the full name of the sponsoring student organization. All information must be factual, and should not mislead or misrepresent the real nature of a student or student group event, service, or activity. Information about ticketed events through the Central Ticketing Office must include the price of the tickets to the patron and specific disclaimers provided once ticketing is approved. Decisions regarding the permissibility of posting or distribution will not be made on the basis of content, with the exception of materials containing illegal content or that violate university or Board of Regents' policies. Student organizations should make every effort to remove their advertising materials the day after the event.

No signs or posters should be placed on trees, utility poles, fences, doors, walls or windows of buildings, car windows, or on any painted surface. When in doubt about whether or not it is okay to hang something in a particular location, wait and check with

the building manager.

No posters or advertisements can be placed in any residence hall without permission from the Campus Living Community Coordinator. To post flyers in residence halls, please contact Campus Living at 928-523-3978. No door-to-door soliciting is permitted in the residence halls—this includes sliding flyers or other materials under doors.

Chalking

Student organizations may not use chalk to advertise events on University sidewalks or other surfaces. Although it is washable, it is costly and time-consuming for our grounds staff to remove the chalk.

Facebook and Other Social Media

Many student organizations use Facebook or other social media platforms to get the word out about their group and their events. Make your group easy to find by using NAU in the name. Upload photos of your events and activities, but remember that social media is a public space and consider the appropriateness of anything you post. You should also update your group regularly so the information is up to date—consider designating one member of your group to run your social media platforms.

You may also wish to register your social media with the University to help you reach a larger audience. Join the [NAU Social](#) scene and enhance your club's social networking in three easy steps.

- 1) [Register](#) your social media accounts with NAU.
- 2) [Share](#) your events on NAU's official social media accounts.
- 3) Tag **#NAU** and share why Lumberjack life is the best life.

Add @NAUStudentOrgs on Instagram and we can help advertise for you. If you would like for us to post anything or coordinate a takeover with you, email us at StudentOrgs@nau.edu. If you would like us to post information about your upcoming events, please email it to StudentOrgs@nau.edu and include any pictures or flyers you have.

TV Monitors

Departments across the University have TV monitors to advertise upcoming events. Advertisements should be sent as an image file (JPEG, IMG, etc.) to digital signage@nau.edu for approval and posting in the Union, in residence halls, and at Campus Recreation facilities. To use screens in academic buildings groups should contact the department office for more information.

Pepsi Banners

Due to generous support from our local Pepsi distributor, student organizations can request a free banner that can be hung outside the University Union or DuBois Center to promote their events. The Unions and Student Activities office staff will submit the request on behalf of the student organization. Please allow at least 2-3 weeks before the date you would like to hang the banner for printing. The student organization will be responsible for picking up the banners from the printer at 4980 E. Railhead Avenue unless other arrangements are made in advance. To request a banner please email



unions@nau.edu with your content and the date you need the banner completed.

Staff from Student Unions and Activities will schedule and hang banners for student organizations. Contact Student Unions and Activities to schedule your banner and ensure there is space available for your advertisement. Banners must be received by close of business the Friday before your banner reservation begins, and may remain on display for in one or two week increments as space permits for events taking place on the NAU campus. Banner dimensions should be 8 wide x 3 deep and must have grommets on the corners. Return of banners cannot be guaranteed due to wind, theft, or other damage. If you fail to pick up your banner within a week of the end of your banner reservation, it will be recycled.

The Lumberjack

[The Lumberjack](#) is Northern Arizona University's student newspaper. It is published every Thursday during the regular semester.

KJACK

[KJACK](#) is Northern Arizona University's student-run radio station. They often partner with student organizations to live broadcast from various events on campus.

UTV62

[UTV62](#) is a student-run commercial-free television station and production studio at Northern Arizona University.

Using NAU Logos or Trademarks

Student organizations that wish to use NAU logos or trademarks, including "Northern Arizona University," on t-shirts or other promotional materials must first have the design approved by the [Trademark Licensing department](#). Be sure to plan ahead as it can take some time to secure approval.

FINANCIAL CONSIDERATIONS

Student Organization Bank Accounts

Northern Arizona University does not provide banking services for student organizations. Organizations that have funds to deposit from member dues, fundraising, or other sources should create and maintain an off-campus bank account. The Office of Leadership & Engagement can provide information about area banks and what they require in order to open an organizational account. Student organization members should create specific processes for deposits and withdrawals and make sure that the treasurer and other officers are trained in these processes.

Here are some things to keep in mind when dealing with a student organization bank account:

- DO NOT deposit funds in the personal accounts of members or the adviser.
- When personal and organizational funds are mixed together there is a risk for mismanagement of funds, intentional or not.
- DO NOT use personal credit cards or debit cards to cover organizational expenses. You run the risk of being stuck with the debt if the organization cannot repay you.
- Consider having at least two signatures on the account to lessen the risk of mismanagement of funds.
- Consider associating the advisers name with the account to provide continuity as officers change year to year.
- Keep good records of your bank account numbers, location, and balances—the Office of Student Life does not keep this information on file.
- Student organizations that collect annual dues or participation fees, do extensive fundraising, and/or have a substantial annual budget are encouraged to set up additional financial oversight measures such as an advisory board, regular budget reports to the organizational membership, and/or an annual financial review.

If you would like assistance setting up sound financial practices for your organization, please feel free to meet with a staff member in Office of Student Life.

Foundation Accounts

Student organizations who wish to accept charitable donations may do so through the university Foundation. Some groups have had success soliciting alumni, family members, and the community for monetary donations to the organization. If a club is not active for 2 years, any Foundation funds will be utilized for general student organization support.

For more information or assistance with this process, please contact us at

StudentOrgs@nau.edu

Federal Tax ID Number (EIN)

The Federal Tax ID Number (also known as the Employer Identification Number or EIN) is a number used to identify a business or other organization. If your organization

applies for funding through the University, holds an event where ticketing goes through the Central Ticketing Office, or you do a fundraiser with an outside business like a restaurant, you need a tax ID number to get paid. You will also need this number to

open a bank account. Student organizations are not allowed to use the University's tax ID number or non-profit status. If your organization is affiliated with a national organization (Greek chapters, honoraries, etc.) you should contact them to see if you are able to use their tax ID number or if you should apply for your own.

If you think your organization already has a tax ID number, check through the materials you received from previous officers or ask your adviser to see if they have a record of it. The Office of Student Life does not generally have a record of your tax ID number but we can check our files to see if we have any information.

The easiest way to apply for a tax ID number is online through the IRS website. You will be walked through the application and receive your number immediately. You can also apply by mail or over the phone. If you have questions or need assistance, you should contact the IRS directly. They can be reached at 1-800-829-4933.

Tax-Exempt Status

Most student organizations at NAU are not legal nonprofit entities. Recognition as a nonprofit organization such as a 501(c)3 is a different and lengthier process than applying for a tax ID number. Please review the IRS website for more details if your organization is interested in pursuing this option. You may also check with your affiliated national organization to see if they permit chapters to use their nonprofit status. Student organizations that wish to provide a tax benefit in exchange for donations may do so through the NAU Foundation.

Student Organization Funding

Student organizations do not automatically receive funding from the University. There are several organizations that provide funds for student organization events on an application basis. You can see all the student organization funding options, and apply for them by visiting nau.edu/dean-of-students/student-organization-funding

Associated Students of NAU (ASNAU)

If your organization wishes to request funding from ASNAU, you will need to work with an ASNAU senator to draft a bill. Please visit the ASNAU office to find out which senator you should work with to sponsor your bill. Funds allocated via senate bill are payable to student organizations on a reimbursement basis—your organization will need to cover all the expenses up front and provide receipts showing you have done so.

To apply for funding from ASNAU, visit www.nau.edu/asnau and fill out the reimbursement application. The completed packet to be submitted to ASNAU will include

the request form, a current budget, a thorough plan for how the funding will be utilized, and any supporting information you wish to provide. You must submit this packet at least 5 business days before the Senate Appropriations Committee meeting—all applications take at least 10 business days to be approved. Your request will be forwarded to the Senate Appropriations Committee and a representative of your organization must attend the meeting to provide any necessary information about the request. Following approval by the Appropriations Committee, the senate bill is passed on to the full Senate. A representative from your organization must attend the Senate meeting. If your funding request is approved, ASNAU will authorize reimbursement up to the amount allocated. In order to receive your funding you must provide documentation of expenses (i.e. receipts) and a summary of the project outcome within two weeks of the funded project or activity.

In general, ASNAU will base funding decisions on the following criteria:

- How the event contributes to the overall mission of the organization
- How the item or event educates, enhances, or enriches NAU students and campus community and contributes to the educational mission of the University
- Whether the item or event duplicates services or activities presently available on campus
- Present funding from other University sources
- The fiscal responsibility of the organization and proposed item or event, as well as the organization's effort to seek and obtain alternate funding

The following are not eligible for funding through ASNAU (this is not an exhaustive list—please consult ASNAU):

- Activities that subsidize University administrative services
- Activities that provide a service more appropriately or effectively performed by an ASNAU or University department
- Funding for salaries or wages.
- Funding for scholarships, cash awards, trophies, or other prizes
- Funding for food and beverage provided by any company other than Sodexo
- Organizations directly affiliated with the NCAA
- Funding for club uniforms, jerseys, and/or sports equipment that will be kept by the organization
- Funding for computers or office supplies
- An organization requesting funding to be used for reimbursement of another group's activity
- Organizations that need funding to repay debts
- Activities that discriminate on the basis of race, creed, religion, national origin, sex, marital status, sexual orientation, disability, age, or veteran status
- Subscriptions or membership fees of any sort
- Insurance of any sort (flight, car rental, etc.)

- Money that would go directly to a charity or philanthropic cause
- Contributions, gifts, or donations to any individual, association, or corporation
- Any part of any event at which alcoholic beverages will be served
- Entertainment not open to the entire student body
- Uber, Lyft, Air BNB, VRBO, and other non-licensed forms of transportation and lodging
- Any non-Northern Arizona University students; any graduate students
- Any part of any event or activity for which a student or member of a club receives course credit

Student Activities Council (STAC)

The Northern Arizona University [Student Activities Council](#) (STAC) provides financial support for events that enhance and enrich students' lives on the Mountain Campus. Any department or registered student organization can seek funding through STAC. The application is available on the Student Life website.

Please note the following requirements before submitting a proposal:

- Funded events must be open to all students and intended to appeal to a wide range of student interests or areas of study.
- Funded events must take place on campus.
- STAC cannot allocate funds for charitable organizations or gifts.
- The maximum amount of funding for any one event is \$10,000.
- Additional information before submitting a proposal:
- Proposals should be submitted no less than 45 calendar days prior to the event.
- STAC will notify the Event Coordinator (person submitting proposal) to arrange a formal presentation during a regularly scheduled meeting.
- Presentation should not exceed 5 minutes with an additional 5 minutes for questions.
- STAC meetings are currently held on Fridays from 10 to 11 am during the fall and spring semesters.
- Unless additional information is requested, proposals will be voted on by STAC immediately following the presentation. Requests may be funded fully, partially, or denied. Once a decision is reached the presenter will be notified within five business days.
- If awarded funding by STAC, the Event Coordinator will have to schedule a meeting with one of the STAC Advisers to review event planning and STAC funding procedures.

If your event is only possible with STAC funding, please apply for funding before visiting Student Unions and Activities to set up your event. If you are going to have your event either way, please begin the event planning process in Student Unions and Activities before you apply for funding. Student Unions and Activities requires at least 30 days to plan large scale events, therefore if you are applying for STAC funding you will want to start at least 6 weeks in advance.

Sodexo

If you are ordering food through Sodexo for an event, you may be eligible to apply for programming funding. When you complete your order online, you can indicate "Programming" as your method of payment. You will also need to complete an application for programming funding which is available through Student Unions and Activities and due at least five (5) business days prior to your event. Each student organization may be granted up to \$250 once each semester towards catering expenses, so be sure to plan accordingly.

FUNDRAISING

Holding a Fundraiser on Campus

All on-campus student events must be submitted and approved in True Blue Connects. Please plan in advance so that you are able to secure the proper permissions—this can take anywhere from a week to 30 days depending on the type of event you are planning. Please see the Event Planning section of this guide for more information.

Restaurant Fundraisers

Many local restaurants can set aside dates where a portion of their profits go to your organization. Details vary, so contact the restaurant you are interested in working with for more information. Remember these still need to be submitted at least 7 days prior in True Blue Connects.

Concession Stands

Sodexo may hire student organizations to run the concession stands at the Skydome during football and basketball games and other large events. Each group needs to provide at least 12 volunteers per stand. If your group has less than that, you may be able to serve as hawkers in the stands or on the concourse.

For more information, contact David Nelson (david.nelson3@sodexo.com) or Alan Keay (alan.keay@sodexo.com).

Fundraisers That Are Not Permitted on Campus

Bake Sales

Due to food safety regulations and the university's contract with Sodexo, student organizations are not allowed to sell homemade baked goods or other foods on campus. You may hold a bake sale if you purchase cookies, cupcakes, or other items through Sodexo and resell them for a profit.

Raffles

The Arizona Attorney General has determined that NAU and its departments and administrative units are NOT permitted to conduct raffles. Using an actual raffle ticket for a door prize is permitted, as long as attendees are not required to pay for the raffle ticket and everyone has an equal chance of receiving it. Any group planning a raffle should be familiar with the law related to this activity and should contact the Office of the Arizona Attorney General for additional information. NAU policies concerning gambling and hosting casino nights can be found [here](#).

A student club or organization that is a 501(c)(3) nonprofit could legally conduct a raffle by satisfying the following conditions:

- The organization maintains its nonprofit status;
- No member or agent of the organization receives any direct or indirect

pecuniary benefit from the raffle (other than participating in the raffle on an equal basis as others);

- The organization has been in existence continuously in Arizona for five years immediately preceding the raffle; and
- Only members of the organization participate directly or indirectly in the management, sales, or operation of the raffle.

There are exceptions for nonprofit organizations that are booster clubs, civic clubs, or political clubs or organizations that are formally affiliated with a political party in Arizona.

Date Auctions

Date auctions or other events where students or staff members are auctioned off to the highest bidder as a date or to provide services to the winner tend to have the appearance of and the “trappings” of slave auctions. Slave auctions were a very real and tragic part of the history of this country. They devalued the dignity of human beings to the level of merchandise. Regardless of the intent of a date auction, it still involves one person “bidding” for the services of another person. The bidding process invariably involves a comparison of the relative “value” of each person being auctioned. On a campus where equality, openness, and sensitivity are valued, any activity that suggests the auctioning of one human being’s services to another is inappropriate.

An extension of the issues above is the need to respect the rights of others and to know that a person cannot be bought. One of the dangerous attitudes that continues to exist is the concept of “whoever pays is entitled.” Many sexual assaults result from the assumption on the part of one or both of the participants that whoever pays for the “date” is entitled to more than the other person may want. Date auctions can create an environment where those expectations may be used to the disadvantage of one or the other participants.

A date auction often involves members of the organization spending time with a stranger that they otherwise might not have chosen to spend time with at all. The organization sponsoring the auction has no way of knowing the motivations of the persons doing the bidding and cannot guarantee the safety of its members. Given these concerns and with the many positive and imaginative alternatives that organizations have for raising funds, auctions should be avoided and will not be approved on the NAU campus.

Any Event Where Alcohol is Involved

Alcohol is not permitted at university sponsored events.

STUDENT ORGANIZATION TRAVEL

Travel Guidelines

The University requires all student organizations to register travel through the NAU Service Team portal when it is more than 50 miles from the Flagstaff campus. The NAU Service Team can support all travel plans including lodging, flights, etc. Visit nau.service-now.com/hr for more information. Making travel arrangements can be expensive and time consuming and student organizations should begin to plan well in advance of the travel dates.

When completing the Group Travel Support form in the NAU Service Team portal please ensure:

- Do not select ASNAU funds as the funding source. Even if you are applying for funding ASNAU is a reimbursement process - they do not front the costs for club travel.
- The Faculty/Staff member responsible for the trip is your club advisor.
- Type of Travel is "Student Club Activity"
- When selecting what department is authorizing the trip please select based on the following:
- Registered Student Clubs (non-sport) and Organizations: **Student Affairs VP OR Office of the Dean of Students**
 - ASNAU Staff (student and professional: **Associated Students of NAU**)
 - Sport Clubs: **Campus Recreation**

Student organizations are representatives of the University and are responsible for adhering to the Student Code of Conduct, University policies and all applicable national and local laws when traveling.

Use of University Vehicles

When approved, registered student organizations may use state vehicles (cars, SUVs, vans, etc.) to attend educational conferences and/or other educational activities directly associated with the mission and scope of Northern Arizona University. State vehicles to be driven by the members or adviser of the organization will not be approved for social activities, community service events, sports competitions, or other activities falling outside the direct educational mission of the University. Students may not drive state vehicles to an event or activity for which they receive a benefit, such as a field trip for which they earn course credit.

In order to use a state vehicle, the student organization adviser must accompany the group on the trip. All drivers must possess a valid driver's license and be registered with the University as an authorized driver. Authorized drivers are those who are employees of NAU and who are driving as part of the official duties of their employment for NAU

(student employees driving members of their student organization to a conference or competition generally do not meet this criteria). Drivers of multi-passenger vans must have an NAU van training certification card.

Transportation Services requires payment via interdepartmental transfer. The Office of Leadership & Engagement will not provide an account number to student organizations for the purposes of paying for state vehicles so student organizations must make other arrangements. In some cases, the adviser's

department may be willing to provide an account number and be reimbursed by the student organization.

Student organizations wishing to use state vehicles should contact the Office of Leadership & Engagement to discuss the request and obtain a Vehicle Utilization Request form. The completed form must be returned to the Office of Student Life at least two weeks prior to the trip. Completion of the form does not guarantee approval of the use of a state vehicle for the student organization event or the availability of state vehicles.

Use of University Shuttles and Charter Buses

Registered student organizations may arrange to use university shuttles or charter buses, driven by a university employee, with appropriate approval from the Office of Leadership & Engagement. Shuttles or charter buses may be requested for educational activities as described above as well as social, community service, athletic, or other events.

The Office of Student Life will not provide an account number to student organizations for the purposes of paying for shuttles or charter buses so student organizations must make arrangements to pay directly via check, credit card, or other approved method.

To request university shuttle buses, student organizations should use Parking and Shuttle Services [online request form](#). Parking and Shuttle Services staff will contact the the Office of Student Life for appropriate approval before finalizing the reservation. To utilize charter buses, the student group should contact StudentOrgs@nau.edu and Student Organization staff will work with Transportation Services to initiate the reservation. Remember, all club activities, events, and meetings should still be registered in True Blue Connects at least 7 days prior.

In both cases, student organizations will be required to fill out any relevant paperwork (FSL event approval, Sport Clubs travel paperwork, etc.) before final approval is given.

Safety Guidelines

- Collect phone numbers and emergency contact information from all participants. Take one copy with you and leave one with your adviser.
- Touch base with your adviser or other designated contact person when you leave and when you arrive at your destination.
- Avoid driving when weather conditions are hazardous or drivers are overtired. Be prepared to stop if necessary.
- Begin the trip well rested, rotate drivers every two to four hours, and allow stops for rest and bathroom breaks.
- Avoid driving between the hours of midnight and 6 am if at all possible.
- Have at least two approved drivers in each vehicle and assign someone to

stay awake in the front passenger seat to keep the driver alert and help with navigation.

- Obey all traffic laws, including posted speed limits and seatbelt regulations.
- Don't call, text, or check email on your cell phone while driving. If you need to make a call, have a passenger do it for you.

RISK MANAGEMENT AND CRISIS RESPONSE

Student Organization Liability

Student organizations play an important role in managing institutional risk. When a group is planning an event or activity, the organizers should take care to consider any foreseeable risk of injury or harm and take steps to mediate that risk. Student organizations are responsible for complying with the law and campus policies and should understand the risks inherent in violating laws or policies. If you have a concern about any activity that your student organization is planning or engaging in, contact the Office of Student Life.

Risk Assessment

When planning an event, student organizations should consider risks in five categories:

- Physical risks involve harm or injury to the physical body. Examples might include injuries due to physical activity, food-related illnesses, use of alcohol or drugs, dangerous travel conditions, and medical emergencies.
- Reputation risks apply to the reputation of the individual officers and members, the reputation of the student organization, and the reputation of Northern Arizona University. Examples might include poor conduct or behavior, a negative representation of the group, or hazing of members.
- Emotional risks involve the thoughts and feelings of members and participants and any other constituents of the event or activity, or the campus community at large. Examples may include hazing of members, lack of accessibility for participants with disabilities, sensitive or controversial subject matter, adverse reactions of participants, or disruption of the campus community.
- Financial risks apply to the budget for the specific event and the overall financial health of the student organization. Examples include poor budgeting, the incursion of debt, overspending, and mismanagement of organizational funds.
- Facilities risks include the safety and maintenance of the facilities used by members and participants. Examples might include lack of proper set-up or clean-up, safety and security issues, and damage to University or community facilities.

Student organizations should assess all risks associated with an activity, considering both the probability of occurrence and the severity of potential consequences. When the probability is high that something will go wrong and the consequences are serious, the organization should reconsider sponsoring the event or activity. In all cases, student organizations need to take actions to minimize risk and develop contingency and crisis response plans in case of emergency. Student Unions and Activities reviews and approves all on-campus student organization events and can assist in the risk assessment process.

Crisis Response

Even if reasonable precautions are taken to minimize risk, student organizations may occasionally find themselves facing an emergency situation. Examples include, but are not limited to: an injury or incident which occurs during an organization event; an injury or incident which occurs while the group is traveling; the death or serious injury of a member of the student organization. Organizations need to deal with an emergency or crisis effectively to minimize the potential for harm to students, the organization, and the University.

The first step in any emergency is to make sure that everyone involved is safe and, if necessary, to call for help. **CALL 911 FOR EMERGENCY ASSISTANCE.**

Once any immediate concerns are dealt with, the adviser or a student leader should notify the Office of Leadership & Engagement of the situation as soon as possible. The Office of Leadership & Engagement can assist you and your organization in making the appropriate contacts including law enforcement, family members, media, etc.. The Office of Leadership & Engagement will work with the organization to determine the next steps and make referrals to resources such as Counseling Services.

APPENDIX A: SAMPLE CONSTITUTION

Constitution Construction Guide

The fundamental requirements of all constitutions are as follows:

CONSTITUTION

Article I - Name

States the name of the organization.

Article II - Purpose

States the purpose and aims of the group.

Article III - Membership

States the requirements and size limitation, if any. Regular membership must be limited to students, faculty, and staff of the University. Must include statement of nondiscrimination ("We agree to abide by Northern Arizona University policy prohibiting discrimination in organizational membership on the basis of race, color, religion, sex, national origin, age, disability, veteran status, sexual orientation, gender identity, and genetic information.")

Article IV - Officers/Executive Committee

Contains the list of officers and their terms of office in the group. Must meet standards (minimum 2.25 GPA) of the University. States the make-up of the executive committee (board or council, the method of their selection, and their term of office. Provision for vacancies of officers or other executive members may be included in a section under this article.

Article V - Meetings

States the regular meeting time and provisions for calling special meetings. If meetings cannot be held regularly, authority to call meetings may be stated here.

Article VI - Amendments

Process usually requires previous notification; also, a two-thirds or three-fourths affirmative vote of those present and voting, or of those present for its adoption.

Article VII - Ratification

May or may not be necessary. If more than a majority of those present is desired, a special article should be included.

BY-LAWS

If the organization has by-laws, sections deal with following:

- 1) Detailed material concerning members, that is, rights, duties, resignation and expulsion procedures. Provision for honorary or associate members or honorary officers if the group so desires.
- 2) Provision for initiation fee, if any, and dues and assessments should be covered here. Also details regarding delinquencies.
- 3) Time and method of electing officers and duties of the officers.
- 4) Duties, authority and responsibilities of an executive committee.
- 5) The names of the standing committees and the method of choosing chairmen and committee members. The duties of the committee should also be stated.
- 6) A provision for some accepted rules of order or parliamentary manual as Robert's "Rules of Order, Revised."
- 7) The number or proportion of the group constituting a quorum.
- 8) A method to amend the by-laws, usually a majority vote.
 - Amending the constitution should not be too simple a process, for the sake of stability of the group; it should be possible to amend the by-laws with greater ease. The constitution should always carry the date it was last revised. It is a good idea to insert in parentheses after an amendment the date it was passed.



APPENDIX B: BANK INFORMATION

The following is a list of local banks close to the NAU campus. Student organizations are encouraged to call any bank they are considering to find out specific details regarding setting up an account including what information is needed to open the account and any applicable fees.

Bank of America

2625 S Woodlands Village Blvd, Flagstaff, AZ

Phone: 928-213-8034

BBVA Compass

2 E Birch Ave, Flagstaff, AZ

Phone: 928-774-7430

Chase

1484 S. Milton Rd., Flagstaff, AZ

Phone: 928-779-7331

National Bank of Arizona

211 N. Leroux St., Flagstaff, AZ

Phone: 928-779-9000

OneAZ Credit Union

321 S. Beaver St., Flagstaff, AZ

Phone: 844-663-2928

Wells Fargo

1251 S. Riordan Ranch St, Flagstaff, AZ

Phone: 800-869-3557

APPENDIX C: FEDERAL TAX ID NUMBER

What is a Federal Tax ID Number?

The Federal Tax ID Number (also known as the Employer Identification Number or EIN) is a number used to identify a business or other organization.

Why do I need a Federal Tax ID Number?

If your organization applies for funding through the University or you do a fundraiser with an outside business like a restaurant, you need a tax ID number to get paid. You will also need this number to open a bank account.

Can we just use the University's Tax ID Number?

No. Student organizations are not allowed to use the University's tax ID number or non-profit status. If your organization is affiliated with a national organization (Greek chapters, honoraries, etc.) you should contact them to see if you are able to use their tax ID number or if you should apply for your own.

Can you tell me what my organization's Federal Tax ID Number is?

Maybe. If you think your organization already has a tax ID number, check through the materials you received from previous officers or ask your advisor to see if they have a record of it. The Office of Student Life does not generally have a record of your tax ID number but we can check our files to see if we have any information.

Is the Federal Tax ID Number the same as being a non-profit organization?

No. Recognition as a non-profit organization is a different and lengthier process. Please review the IRS website for more details if your organization is interested in pursuing this option.

If my club has a Federal Tax ID Number does that mean we need to file taxes?

Maybe. Most student organizations do not deal with large enough amounts of money to necessitate a tax return, but you should always consult with a tax professional to be certain.

How do I get a Federal Tax ID Number?

The easiest way to apply is online through the IRS website. You will be walked through the application and receive your number immediately. You can also apply by mail or over the phone.

To apply online:

- 1) Go to the [IRS' Apply for an Employer Identification Number \(EIN\) Online website](#)
- 2) Click the "Apply Online Now" button.
- 3) Once you have read the instructions on the page, click the "Begin Application" button.

- 4) Select the "View Additional Types, Including Tax-Exempt and Governmental Organizations" option for the "What type of legal structure is applying for an EIN?" question and then click the "Continue" button.
- 5) Any of the following options may describe your type of organization:
- 6) Political Organization; 2) Church-Controlled Organization; 3) Community or Volunteer Group; 4) Social or Savings Club; or 5) Sports Teams (community). Once your selection is made, click on the "Continue" button.
- 7) To confirm your selection click the "Continue" button.
- 8) Enter your first name, last name, and SSN/ITIN.
- 9) Select whether you are an officer or member of the organization or whether you are applying for the EIN as a third party on behalf of the organization and then click the "Continue" button.
- 10) Enter the address information for your organization and click the "Continue" button when you are done.
- 11) Enter the requested information about your organization and click the "Continue" button when you are done. Repeat this step for the next screen requesting additional organizational information.
- 12) Select the "Other" option for the question "What does your business or organization do?" and click the "Continue" button.
- 13) Select the "Organization" option for the question regarding your business activity and click the "Continue" button.
- 14) From the list of organizational activities select the activity that best describes what your organization does and click the "Continue" button.
- 15) Select whether you would like to receive your EIN confirmation letter online or by mail and click the "Continue" button.
- 16) Once you receive the information, retain it in your student organization files for current and future leadership.

Who do I contact if I have questions or have trouble filling out the online form?

For assistance you should contact the IRS directly. They can be reached at 1-800-829-4933.

APPENDIX D: OUTGOING OFFICER WORKSHEET

Position: _____

Name: _____

Phone Number: _____

Email Address: _____

Date: _____

Please think through and respond to the following questions regarding your responsibilities; this information will be helpful to your successor. Lessons learned from this reflection can be shared with incoming officers verbally or in written format.

The responsibilities of my position included:

List other officers with whom you worked and the projects involved:

List what you enjoyed most and least regarding your position:

Who was the most helpful in getting things done? Who were good resources? List other aids that helped complete your job:

Things you wish you had known before you took the position include:

List specific accomplishments realized during your term in office and the reasons for their success. What did you try that worked well and you would suggest doing again? Why?

List any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?

What could you have done to make this a better experience?

List supplemental materials and sources of information you found most helpful. Include specific staff or faculty contacts, university / college officers, community resources, etc.

Create a timetable/list important dates related to your position. Provide suggestions for increasing efficiency and effectiveness.

What should be done immediately during the summer? In the fall?

List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

APPENDIX E: INCOMING OFFICER WORKSHEET

Position: _____

Name: _____

Phone Number: _____

Email Address: _____

Date: _____

The new officer can ask these questions to the outgoing officer to gain a solid understanding of the position.

Things specific to the position I want to know about (forms, duties, etc...)

Things I should do over the summer...

People (positions) that I should get to know...

Services or offices that I need to know about...

Things I need to know about working with my advisor...

Other questions I want answered...

What do you consider to be the responsibilities of your position?

What expectations do you have of the executive council/board?

What expectations do you believe your members have of you?

What problems or areas will require attention within the next year?

What should be done immediately in the fall?

