



INSTITUTE OF TECHNOLOGY

ADVISOR HANDBOOK

PRODUCED BY:

STUDENT LIFE DEPARTMENT

PORTIONS TAKEN FROM OSU ADVISOR HANDBOOK

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INSTITUTE OF TECHNOLOGY

Student Life

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Dear Advisor,

Thank you for taking on this role as an advisor for a student organization. Without you stepping forward to serve, this organization might not be able to exist. So, please know that volunteering time and talent means a lot to your students as well as those of us in the Student Life Department.

This handbook is intended to assist you in the role as student organization advisor. Enclosed you will find information to assist you and your organization with the required forms for club activities as well as information about campus resources.

Please let me know when and how we can best assist you and feel free to drop by our office in Covelle Hall anytime.

Again, thank you so much for taking on this additional role which is so important, not only to your student leaders, but to the retention efforts of the University.

Sincerely,

Kamie Crawford
Director of Student Life

Table of Contents

1. Advising

- Role of the Advisor
- Student Rights & Responsibilities – Clubs & Organizations
- Submission of Forms
- Club Financial Responsibility
- Challenges of a Student Organization
- Managing Conflict with your Organization
- Transitioning Student Leaders

2. Clubs & Organizations Support Information

- Campus Licensing & Media Information
- Campus Resources and Information

3. Appendixes

- Club Registration Form
- Fee Allocation
- Advisor Incentive Program
- Student Organization Points Program – Points Verification Form

Club Finances

- Financial Reports – Monthly
- Club Signature Card
- Basics of P-card for Clubs
- Works How-to – Completing Transactions
- Club Funds Disbursement Request
- Club Deposits
- Procedures Soliciting & Accepting Donations
- Campus Activity Requests

Club Travel

- Day Trip Travel Packet
- Overnight Trip Travel Packet
- Vehicle Reservation

The Role of the Advisor

An advisor plays an important role within a student organization. Each student group and student organization has its own specific needs and expectations for its advisor, but these may change from year to year. It is important to realize, when deciding whether or not to be an advisor, you need to be committed to the success of the student organization. Different advisors have varying levels of involvement with their organizations.

The scope and frequency of an organization's activities, the effectiveness of its officers, the time demands of the advisor, and other potential factors determine the level of involvement an organization's advisor will have. While it is not possible to establish a single model to serve as the standard for all groups at all times, there are some general ideas which would apply to almost every advisory role.

The prospective advisor should have some basic knowledge of the structure and purposes of the group being advised. This can be done through a review of the group's constitution, attendance at a regular organizational meeting and discussion with the group's officers prior to accepting the advisor's position for a group.

An important role for any advisor is to act as a resource to the organization's leadership team. The advisor brings personal experiences and expertise to a student organization and this can be crucial to the success of the group. Additionally, the advisor generally has had experience with the University and can often provide significant direction to students in ways of getting things done within the University setting.

The advisor needs to know about the student group's finances and budget. Since the advisor's signature is needed for most financial transactions of student organizations, it is incumbent upon the advisor to be very knowledgeable about the student group's finances. It is often through the development of an organization's budget and the subsequent implementation of the budgeted programs that an advisor can be of great assistance in the development of a group's programs.

The advisor must be willing and able to devote time and energy to the student group. **An advisor should attend every meeting or activity of the group.** Students find the formal and informal contacts with their advisor to be richly rewarding. These connections

can help enhance an individual's college experience and can aid the group in maintaining a presence at OSU Institute of Technology.

One of the most frequently asked questions about advising student organizations concerns the legal liability of the advisor. As a general rule, as long as the advisor is acting responsibly and fulfilling his/her duties that are consistent with the organization's constitution, the University will support him/her. The advisor would probably not be held personally liable for mistakes as long as the organization is not engaged in an activity which is illegal and as long as there is no negligence involved in the performance of the advisor's duty. OSU's Legal Counsel has offered the following terminology, "use common sense and sound judgment". If you ever have questions contact the Director of Student Life, Kamie Crawford, kamie.crawford@okstate.edu, Dean of Students, Devin Debock, devin.debock@okstate.edu, or University Legal Counsel for more information.

As faculty and staff members at OSU Institute of Technology, it is important to keep in mind that there are University regulations and expectations of you as an advisor. It is also important that advisors be aware of the Conduct, Rights and Obligations of Student Organizations, Section XI, in the OSU Institute of Technology's Student Rights and Responsibilities Governing Student Behavior released annually through the Residential Life Office and Administration. You may view the most up to date version online at <https://osuit.edu/campus-life.php> - Scroll to the bottom of the page and look for the PDF link. The following is the section in its entirety.

XI. Conduct Rights and Obligations of Student Clubs and Organizations

As individual students are asked to uphold certain expectations, organizations and their officers are under obligation to the University and larger community to maintain high standards of ethics and conduct. This includes proper maintenance of financial records and sponsorship of events and activities that uphold the standards of the University. Any activities that encourage the improper conduct of student members which violate the prohibitions contained within the Student Rights and Responsibilities Governing Student Behavior may cause the charter of the organization to come under judicial review by the Director of Student Life.

A. Benefits Afforded Student Recognized and Registered Clubs/Organizations

Recognized clubs are clubs with 4 to 9 members and have the following privileges:

- *Within limits, use of the OSUIT name in connection with club/organization sponsored programs and activities.*
- *Scheduling available university-owned areas and/or facilities for club/organization meetings and sponsored activities.*
- *Promotion of your club/organization and its officers in campus publications where other registered clubs/organizations are listed.*
- *Announcement of club/organization sponsored programs and activities in the OSUIT newsletters.*
- *Recruitment of members during enrollment along with other recognized campus clubs/organizations.*
- *List club/organization information on OSUIT student club/organization directories, located in Covelle Hall and the Student Union.*
- *Participate in the monthly Round Table informational meetings.*
- *May schedule field trips as funding allows.*
- *Request Start-Up funding not to exceed \$900 (\$100 for each member) from the Director of Student Life and to be approved by the Dean of Students. After existing as a Recognized student club/organization for a period of two (2) years, clubs may request funding from the student fee allocation committee.*
- *Sponsors of the club/organization may participate in the Advisor Incentive Program during the fall and spring semesters.*

Registered clubs are clubs with 10 or more members and have the following privileges:

- *Within limits, use of the OSUIT name in connection with club/organization sponsored programs and activities*
- *Scheduling available university-owned areas and/or facilities for club/organization meetings and sponsored activities*
- *Promotion of your club/organization and its officers in campus publications where other registered clubs/organizations are listed*

- *Announcement of club/organization sponsored programs and activities in the OSUIT newsletters.*
- *Recruitment of members during enrollment along with other recognized campus clubs/organizations*
- *List club/organization information on OSUIT student club/organization directories, located in Covelle Hall and the Student Union.*
- *Participate in the monthly Round Table informational meetings.*
- *May schedule field trips as funding allows.*
- *Request funding from the student fee allocation committee after existing as an active OSUIT student club/organization for a period of one (1) year.*
- *Sponsors of the club/organization may participate in the Advisor Incentive Program during the fall and spring semesters.*

To register your club/organization or update/revise an existing registration form, go to the website <https://osuit.edu/student-life/forms.php> and complete the Club Registration Form and submit the completed form via email to the Student Life office.

Each recognized and registered club must file a new Registration Form and Roster of Members form every year by the end of September. Any club that fails to file both forms will become an inactive club. The status of the club can be changed to active by filing both forms.

B. Obligations of Student Clubs/Organizations

1. Required Information: Each student club/organization is required to submit the following information to the Office of Student Life at the beginning of each fall semester or when new officers are elected.

- a. name, address, and telephone number of each officer;*
- b. name of the organization's faculty/staff advisor;*
- c. time and place of regularly scheduled meetings;*
- d. the purpose of the organization.*

Changes during the school year need to be reported promptly.

2. Participation: All clubs/organizations will be represented at the monthly Round Table Luncheon.

3. Advisors: All clubs/organizations must have an advisor who is a full-time faculty or staff member. Exceptions to this rule may be granted by the Office of Student Life. Sponsors are ultimately held accountable for actions taken by the club/organization. Advisors responsibilities include:

- a. attending group meetings and sponsored activities;*
- b. assisting in program and/or project development;*
- c. serving as a resource to the club/organization with regard to University Policy and procedures;*
- d. advising the club/organization on financial matters.*
- e. serving as the point of contact between the club/organization and Student Life.*

4. Financial Obligation: All funds of recognized clubs/organizations must be kept on deposit with the University. All funds must be deposited with the Bursar within 24 hours of receipt. Funds of clubs/organizations may not be used to purchase alcohol or beer.

5. Meetings: It is the responsibility of the student club/organization to schedule its meetings and activities in accordance with the policies of the University, campus, student activities, and the building being scheduled. All student club/organization activities shall be properly organized and supervised. All student activities must be approved through the Student Life Office. Copies of approved Campus Activity Requests will be forwarded to the appropriate offices.

To assure sponsored activities meet all requirements, the following procedures must be observed:

a. Authorized student club/organizations planning an entertainment activity, project, or activities for raising funds must complete and submit a Campus Activity Request to the Student Life Office for approval prior to advertising, scheduling, making commitments, or related arrangements. Activity requests should be approved seven days prior to the activity and should be announced in Student Life activity announcements during the week of the event.

b. The sponsor is to assist the student group in completion of Campus Activity Request forms and will be responsible for arrangements and supervision of the activities. All school activities sponsored by a campus club should have two faculty and/or staff members as chaperons. For club recreational activities off-campus, the number of chaperons assigned, in

addition to sponsor(s), shall be at the discretion of the Director of Student Life and Dean of the School.

c. *Non-student visitors and guests under the age of 18 are not permitted to attend or participate in club events or activities, unless prior approval from the Director of Student Life is obtained and all OSUIT Minors of Campus policy requirements are fulfilled.*

6. *Poster and Posting Regulations: Distribution of handbills, pamphlets, flyers, etc., is a privilege granted only to students of recognized clubs/organizations. All such literature must bear the name of the club/organization on the front page of the material distributed and be approved by the Office of Student Life. Such material may be distributed only in those areas designated as distribution areas by the Office of Student Life or Residential Life, as appropriate. A copy of the literature to be distributed must be filed in the Office of Student Life. Special permission may be granted to other groups by the Student Life Office for distribution only on designated public boards. (See Section XIII, E, "Distribution of Literature" for more details.)*

7. *Production of Club Items and Apparel: Student clubs may wish to produce items such as, but not limited to, T-shirts, caps, mugs, towels, notebooks, banners, or clothing. Any item bearing the University name, logo, and/or club name must be approved through the Student Life Office. A full design layout of the item(s) to be produced must be submitted to the Student Life Office for approval prior to purchase.*

C. Student Clubs/Organizations Misconduct

It is not possible to list every potential situation which might result in a determination that a student club/organization has violated the policies of the University. Advisor/students violating University Policy will be referred to a Hearing Officer. If it is found more likely than not that advisors/students were in violation of University Policy while representing their club/organization, the Director of Student Life will make a determination regarding the club/organization's status which could result in probation or suspension of the registration as a recognized club/organization by the University. Any appeals of the decision made by the Director of Student Life shall be made to the Dean of Students.

D. Code of Ethics for Student Clubs/Organizations

1. *Relationship of student club/organizations to the University: Registration of a club/organization does not mean that the University supports or adheres to/by registered*

student groups. Responsibility for any action which violates federal, state, or local laws or University regulations is assumed by the individual groups, their officers and members.

2. Introduction of Code of Ethics: The extension of privileges by the University as detailed in this document requires registered student clubs/organizations to conduct their organizations and activities as responsible bodies in their relationships with their members, other students, the community and the University. Clubs/organizations and their members are subject to being governed and sanctioned by the same rules and regulations established for individual students. In addition to statutory obligations, this Code of Ethics has been established for the students by the students as a set of guidelines for all registered student club/organizations. Each registered student club/organization is encouraged to adopt and abide by this Code of Ethics.

3. Specific Standards of Ethics:

a. Academic: In accordance with the larger mission of the University, the Code of Ethics encourages a portion of a club's/organization's activities reflect a conscious effort to enrich each member's academic development.

b. Character Development: The moral conduct and personal behavior of each member affects the organization's image. This makes it important for the individual to act at all times with self-respect and integrity. University policy prohibits students from cheating, using alcohol on campus, providing fraudulent information, or in any way misrepresenting themselves in interactions with the campus or larger communities.

c. Community Relations: Supportive, communicative and positive relations with the community will result in mutual benefit. The impression made by a club/organization on the community reflects upon the University as a whole. All organizational members will conduct themselves so as to support a positive relationship with the community.

d. Financial Management: Members shall handle both institutional and private funds judiciously, recognizing the annual transfer of debt responsibility. Members shall not incur debts (either individually or in the name of the organization) which result in organizational disability.

e. Health and Safety: Members shall take basic precautionary measures to ensure individual and group safety. An appropriate program would encompass a concern for mental, emotional and physical well-being.

f. Leadership Development: The continuing existence of the organization requires a regular succession of effective leaders. An appropriate program would provide for the development of the members' leadership skills for future positions of service and authority.

g. Legal Responsibility: Each club's/organization's members have a responsibility to know and uphold all relevant federal, state, and local laws and University policies. Student clubs/organizations should be knowledgeable of and comply with the expectations set forth by the University for individual students and student clubs/organizations.

h. Multi-Cultural Sensitivity: Both the University community and the larger society are diverse, with persons from differing ethnic and cultural backgrounds. Clubs/organizations must recognize and respect the cultural heritage of others. Compliance with the Oklahoma State University Equal Educational Opportunity Policy is required. Guidance regarding the interpretation and implementation of this policy is always available at the Student Life Office, or the Student Services Office.

E. Obtaining Registration as a Student Club/Organization

Registration entitles your club/organization to certain privileges, assists the Student Life Office in its advisory responsibilities to your club/organization, provides resources and needed information, and furnishes potential new members with a point of contact to your club/organization. To obtain registration as an OSU Institute of Technology student club/organization, your group must complete the following three (3) steps:

1. Have an accepted Petition for Recognition Form on file in the Student Life Office

a. meet with the intended sponsor and Director of Student Life prior to beginning the process of petitioning;

b. complete the Petition for Recognition Form which should be filled out by the intended sponsor and include the following information:

i. name of group;

ii. purpose of group;

iii. objectives of group;

iv. state if your group will duplicate the function of any existing club/organization on campus;

v. state if the need and desire of students will be sufficient to maintain a strong organization by registering as either Recognized (less than 15 charter members) or Registered (Fifteen or more charter members) club/organization;

vi. signature of intended sponsor and intended sponsor's division chair, department head or supervisor acknowledging that he/she is aware of the responsibilities and requirements of sponsoring a student club/organization on the OSU Institute of Technology campus.

2. Have an approved Constitution and By-Laws on file in the Student Life Office

a. draft the constitution and by-laws using the following outline:

i. the purpose of the group;

ii. methods of electing/selecting officers and members;

iii. role of the officers;

iv. goals and how they will be met (committees, funding, etc.);

v. anti-discriminatory clause within the membership section of your group's constitution.

b. Constitutions and by-laws are approved by the Director of Student Life and the Dean of Students.

c. All student clubs/organizations are required to update/revise their constitution and by-laws a minimum of one time every three years and submit a copy to the Student Life Office.

3. Have a current/updated club/organization Registration Form on file in the Student Life Office

XIII. Other University Policies

C. Solicitation on Campus

No sales or solicitation may be conducted if such is in competition with products or services offered in the Student Union or in conflict with the covenants of the University bond requirements. Bond indentures or buildings financed with self-liquidating bonds pledge all revenues collected in the building to be deposited with the official depository or accounted for by the University administration; therefore, close supervision of sales must be maintained. Normally, solicitation can be divided in to the following categories.

1. Student Clubs and Organizations will adhere to the following:

a. Secure permission from the Office of Student Life.

b. Secure permission from the School Dean or Department Leaders affected by the sale if appropriate. All solicitation in University recognized housing must have primary approval of the Director for Residential Life.

c. Sales solicitation to more than one campus group or residence must have the approval of all student groups and School Dean or Unit Leaders which are affected by the sale. The scheduling of space will be determined by the Office of Student Life.

2. Private Enterprise: No private enterprise will be permitted to solicit business on grounds, in academic buildings, or in the University Physical Plant service facilities.

Special permission may be granted for sales and solicitation from tables in approved non-academic public spaces. A rental fee may be assessed by Student Life. Door-to-door sales to students' rooms are not permitted; however, deliveries may be made to rooms.

E. Distribution of Literature

Distribution of handbills, pamphlets, etc., is a privilege granted only to students of recognized and registered clubs and organizations. All such literature must bear the name of the club or organization or responsible individual on the front page of the material distributed. Such material may be distributed only in those areas designated as distribution areas by the Office of Student Life or Residential Life, as appropriate. A copy of the literature to be distributed must be filed in the Office of Student Life. Special permission may be granted to other groups by the Office of Student Life for distribution only on designated public boards.

Once approved, the Office of Student Life will stamp the approved information with a special permit stamp. Any materials posted without the special permit stamp will be removed.

Sponsoring groups must remove all posted information after the advertised event. Flyers, posters, signs, etc. without a special permit stamp, those left after the expiration date, or those posted in an unauthorized area will be removed.

Information may not be posted on walls (interior or exterior), trees or shrubs, trash cans, elevators, or any other area other than the areas specified as approved posting areas on campus. Any group or individual that does not follow the above mentioned guidelines for posting information on campus will be in violation of University policy.

1. The privilege of distribution which is accorded to any free student publication shall be equally accorded to all free student publications.

2. For buildings other than organized living units, the Director of Student Life shall determine, after consultation with the administrative occupants, the places of distribution.

Submission of Forms Required by Student Life

As an advisor of the organization, one of your responsibilities is to make sure all required paperwork is submitted to the Student Life office in a timely manner. Each fall term, there are three documents that must be on file with Student Life; club registration, signature card, updated constitution and bylaws.

- The club registration form can be found on the Student Life website and must be completed and submitted prior to the Fee Allocation process each fall. This form is also required any time there is a change in officers or advisors.
- The signature card must be submitted with the club registration form to ensure the current officers are on file to approve any expenditures.
- Student Organizations are required to review their constitution and make necessary updates every three years. If you have any questions about your constitution, you may contact the Student Life office.

Submission of Campus Activity Request & Points Verification Forms

With some recent updates in procedures for these two forms, Student Life wanted to provide you with information on the requirements for earning points for your club. *(While both forms are now online web forms and can be completed and submitted online, the Campus Activity Request submitted for any club travel must be in the paper PDF form.)*

Campus Activity Requests: A Campus Activity Request (CAR) needs to be submitted when your club is co-sponsoring, hosting, creating, or sponsoring an event. A CAR must be submitted with the Trip Insurance Form anytime a club travels outside the city limits of Okmulgee. (Note: this is the paper form included in the travel packet for club travel) You will receive an email in response to your online form submission for anything other than club travel.

Points Verification Forms: Points Verification Forms (PVF) must be submitted within 7 days of the event and contain the names of at least 3 club members (cannot include the advisor) to earn points. All points are accumulated for the academic year and used to determine the Club of the Year. You will receive an email response to your online form submission.

Copies of all of the forms can be found on the Student Life website.

Student Club Financial Responsibility

As stipulated in the Students Services policy 4-003 Student Activities and Accounting Procedures for Student Club Funds, Section 4.01, " *It is recommended that advisors obtain a procurement card (P-Card) for their student organizations to make purchases as needed.*" All P-Card purchases must be approved by the Director of Student Life **prior** to making the purchase. Following is the current pre-approval policy.

Student Clubs and Organizations -- P-Card Preapproval Policy

Each Advisor cardholder is required to seek pre-approval from the Director of Student Life before using their university provided credit card (P-Card) to purchase items necessary to do club or university business.

Pre-approval may be obtained by e-mailing the Director of Student Life with the details of what is to be purchased and estimated total including typed and signed club meeting minutes approving the purchase. Because clubs are taxable, be sure to include the estimated tax, shipping & handling in the amount of your proposed purchase. The Director of Student Life will then approve, or deny and ask for additional information. Upon approval via e-mail, the P-Card Holder may then make the purchase utilizing their club P-Card.

Emergency Provision

In the event of an extreme emergency (sickness, wreck, hospitalized advisor, etc.) the Director of Student Life can make a purchase on the Club's behalf. The Club President will contact the Director of Student Life and follow up via e-mail with the emergency request. The Director of Student Life will then make arrangements for the emergency purchase. The Club will then provide signed minutes of the emergency request to the Director of Student Life after the next club meeting.

Directions for posting information to the WORKS program after a club P-Card purchase are found in the Appendix.

Challenges of a Student Organization

Student organizations face frequent challenges throughout the term. This section will help provide you, the advisor, with information regarding the variety of challenges that you may face.

Student Leadership:

The student leaders within your organization will be one of your strongest assets in your role as an advisor. However, it is important to recognize that the leadership of your group will also provide its own unique challenges.

It is important to ensure that the leadership does not make major decisions without consulting the rest of the organization, unless your organization Constitution allows. This ensures that everyone is able to have input and allow for better unity. Additionally, there may be tension between leaders of the organization, which, if not managed, could become hazardous to the organization's activities as a whole.

Your leaders may go through a rough patch where they lack confidence or assertiveness when dealing with each other or members. At times it may appear that the leadership has lost enthusiasm about the organization. This may come from a leader(s) feeling overworked or one who is over committed and cannot dedicate the time that is necessary to work with the organization. As an advisor it is important to talk with the student(s) and see if it is something that they are still willing to do fulfill their role within the club. You need to help motivate and encourage them to maintain their enthusiasm and hard work.

Membership:

The organization may experience challenges when trying to obtain a strong turnout for meetings. This can be particularly challenging if a vote needs to be held and there are not enough members present to decide on an issue. Struggling meeting attendance may relate to how members feel about the organization. Members may feel dissatisfied with their experiences and grow to be bored or apathetic about the organization. If there is a lack of camaraderie or a feeling of disconnection within the group, it can increase members' lack of interest. The goals of the members have differed from that of the group and they are no

longer looking to be involved. When members present new ideas and they are rejected for being different or non-traditional it can lead them to feel that their input is not valuable and keep them from being invested.

Organizational:

It is important to consider whether or not the organization has a well-defined mission or goal that is understood and followed through by not only the members but the leaders as well. Without a strong foundation, the organization will have a challenging time following through with any programs, meetings, or making any progress at all. Additionally, if meetings run too long or have become disorganized or unfocused these can cause both members and leaders to grow impatient and dissatisfied with the experiences within the organization. One challenge that exists particularly for new organizations is based in financial limitations. Additionally, a great alternative can be to co-host an event with another student organization to cut back on costs and increase attendance.

Advisor:

Take time to learn the names of the organization members and speak to them regularly so as to develop a causal relationship with them. Without this relationship, members may avoid interacting with you and not want to get involved. If students are lacking in their leadership, do not assume a leadership role. Assist students in resolving the challenges they are facing. If you feel that you have taken on too much or are unable to dedicate the time necessary to the position, then it is imperative that you speak with the Director of Student Life as well as your student leadership and work to find a replacement for the position.

Relationship between Student and Advisor:

In your role as advisor, one of the great benefits is having the opportunity to get to know students. Like most good relationships, those developed with your organization's members and officers should involve an open and honest relationship. This type of relationship allows both the students and yourself the opportunity to receive feedback, share ideas, and build

trust. As you get to know the students within your group better, it is important to understand that each student may look to you for a different purpose.

Some students will look to you as a mentor. A mentor/mentee connection can develop into a long lasting relationship. Mentoring typically happens in a one-on-one environment with a student. The student may look to you to help them grow in a professional or personal capacity. Even if the student's field of study or career pursuits is different from your own, they may come to you for professional advice. By developing the student as a professional, you will also make an impact on a personal level. Along this line of work, the student may also ask you to act as a sounding board for their ideas and goals. Additionally, you may be asked to review the students' resume, or assist in making connections with resources either in the institution or the community.

The student(s) may also look to you as a personal mentor. In this type of relationship, it is essential to employ good listening skills. Students may want to talk to you about things that are of a personal nature, (friends, family, etc.) It is important that you are able to distinguish between discussing personal matters and identifying when a student is reaching out for help. If a student is going through a particularly challenging time, do not be afraid to help the student get the appropriate level of help that he/she needs. As a mentor the student may listen to your advice more so than that of other people.

As an advisor you may also be looked at as a leader. Both the officers and members of the organization will look to you for help and guidance. An important role is to assist in the development of the students' leadership skills within your organization. It is important to help students find new ways to improve the organization and help it grow. Challenge students and help them grow holistically through their involvement in the group. Help your students to ensure that they are meeting their academic goals and maintaining a successful grade point average. Act as a role model for students both in a personal and professional sense. Being a strong leader can develop not only yourself but also your students and the organization as a whole.

Managing Conflict within Your Organization

As an evolving and dynamic entity, student organizations frequently experience fluctuations with members that have a variety of personalities and styles. Conflict is part of

every group and it is not uncommon for members or leaders of an organization to disagree. Addressing these conflicts early is necessary so that they do not impede the organization's progress. One should seek to find the root cause of the conflict, take charge and work to resolve the issue.

Conflict is not black and white but has the potential to be both positive and negative. Positive conflict can act as a catalyst for communication and allow members to relieve pent-up feelings. It can allow for opportunities of personal growth and contribute to change. Additionally, the conclusion of the conflict may be able to lead to a stronger and more effective group environment. Negative conflict has an equal number of drawbacks. It can push members away from the group and cause unnecessary stress. Dramatic situations can occur depending on what has instigated or created the conflict. Conflict of this nature also diverts time and energy away from the group's goals and work. Understanding the nature of a conflict and the specific ramifications that may arise based on the nature of the incident and the people involved can help increase the odds of resolving the issue.

Not every conflict in a group is monumental and needs to be resolved in a large manner. Sometimes differences in opinion are just that and will not lead to any more serious dilemmas or problems. Not addressing a problem immediately can also allow for those involved taking the time that is needed to calm down and address the issue from a rational perspective. As an advisor it is important to discuss with your executive officers what is happening in the organization. You do not need to get involved in every situation but instead provide your leaders and members with guidance on how or when to act in a situation. However, this attitude does not work in every situation.

For certain conflicts, one of the worst things that can be done is to try and avoid the situation all together. Taking the time to manage a conflict at the early stages can prevent it from becoming greater and bogging down the organization with tension and problems. Try and work out the problems in as small a setting as possible, either one-on-one or in a small group. Work with your organization's executive officers to address the conflict and try to resolve situations before they escalate.

A leader is often needed to overcome the emotions involved in a conflict. In some situations, it is important to step back and allow your organization's officers to try and work through the dilemma themselves. This helps to show your trust in their abilities and gifts. It

is important to coach them through and provide them with counsel on how to handle a situation. If the organization's official leadership falls short, realize that positive change can come from almost any member. Any individual in the group can provide that leadership, so it's helpful for all members to learn how to cope with conflict to be healthier, happier and more effective in groups.

It is important to recognize that as an advisor you may be placed in a challenging predicament. You want to be respected by the members of the organization, but you also need to be vigilant of problems and challenges. It will take time for you to determine the balance between making the decisions for students and guiding and advising students so that they come to the conclusion on their own. Be sure to balance your comments to ensure that your organization members realize that you have the best intentions for the group and will come back to you for advice and help.

The Student Life Department is able to help you resolve issues within your organization. A staff member can attend a meeting and act as a consultant to observe the challenges and provide the group and members with feedback.

Learning to manage conflict will lead to a more productive team and more satisfied group members who feel welcome to communicate openly, take risks and exchange ideas.

Transitioning Student Leaders

One of the most important duties that an advisor can fulfill is helping with the transition of officers/leadership. In your role you know the dynamics of the organization, the progress and challenges it has faced, and can help maintain continuity and stability throughout the group. It is important that you do what you can to help the new student leaders get acclimated with the organization and with their new roles. Be sure that you review the position requirements with the students to ensure that they fully understand all of their new found duties. By spending time with the organization's new leadership at the beginning of the transition the more easily the organization will function throughout the year. There are steps that can be taken by the current leadership before vacating their positions to aid in the transition process.

- Develop and maintain a student organization binder which contains

- ◆ Constitution and by-laws
- ◆ Officer descriptions and duties
 - Be sure to update these as the organization evolves
- ◆ Contact information for members of the organization and other officers
- ◆ Minutes/agendas from past organizational meetings
- ◆ List of programs that have been done previously
- ◆ Contact information for different areas of the university that the students might work with such as Student Union Services, Food Services, etc.
- Hold a meeting with the outgoing and incoming organization officers
 - ◆ Allows the old and new officers time to speak one-on-one
 - ◆ Provides an opportunity to discuss challenges, successes and allows the incoming officers to ask personal questions
- Spend time with the incoming officers
 - ◆ Allow them to get to know you early on to help cultivate relationships
 - ◆ Set expectations of one another at the beginning of their experience
- Host a new officer meeting
 - ◆ Reassess organizational goals
 - Encourage officers to suggest new ideas
 - ◆ Provide opportunity for team building ideas and activities

Campus Licensing & Media

Licensing Information

Oklahoma State University benefits from public recognition of its name, symbols, logos, and other identifying marks. These marks give a unifying image, which is critical to establishing a visual presence within the world of university communities. This image becomes identified with the quality of OSU's programs, products, and services and distinguishes its programs from other universities.

OSU has registered the names, logos, and trademarks of the university with the Patent and Trademark Office of the United States as well as the Oklahoma Secretary of State. Products bearing those marks and distributed for resale or used for other promotional

purposes are subject to the licensing policies of the University. The University has delegated the responsibility for administration of these policies to the Office of Trademarks and Licensing located in the Office of the Legal Counsel.

The University's rights to its marks are governed by federal, state, and common laws. These laws place an obligation on the University to avoid consumer confusion and require that the use of any marks be monitored to avoid losing exclusive control.

The mission of the Office of Trademarks and Licensing is to insure (1) proper use of those trademarks, service marks, logos, and insignias that have come to be associated with Oklahoma State University; (2) generate income to support and enhance the scholastic missions of Oklahoma State University; and (3) protect the university's reputation, good name and image by permitting only appropriate uses and assuring that only quality products bear the institution's name, initials or marks.

Therefore, if student organizations wish to purchase any products bearing the marks of the University, they must be purchased from a licensed vendor.

To learn about the rules for licensing please visit the trademarks website, <https://trademarks.okstate.edu/licensing-information>. A list of all groups that are licensed to handle the OSU logos and trademarks is also on the website. For more information or if you have any questions be sure to contact OSUIT Marketing and Communications at 918-293-4966 or email Lindsay Lynch, Director of Marketing & Communications at Lindsay.lynch@okstate.edu.

**Information obtained from Licensing and Trademarks website; <https://trademarks.okstate.edu/>*

Media Information for Clubs & Organizations:

Swank Motion Pictures

1-800-876-5577

<http://swank.com/>

If you are interested in showing a film, television show, or series on campus you must obtain the rights to the film. Swank Motion Pictures can work with you to help you sponsor and host your event.

Campus Resources & Information

As an advisor a large portion of your responsibility is working and interacting with students regularly. As you collaborate with students more & gain increased skills, you must remain observant of warning signs for potentially dangerous behaviors, habits, needs, etc.

Advisor Role in Reporting Concerning Information or Behavior:

There may be occasions when a student will share personal information with you that is not directly related to the student organization, such as a problem with a professor, difficulty with a class, or an issue with a spouse/partner. We have provided you with a list of resources within this document so that you are able to make appropriate referrals or contact the resource area for more information. The relationship you develop with the officers and members of a student organization may lead you to be one of the first people to hear about stalking, sexual harassment, sexual assault or intimate relationship violence. It is important that you are aware of signs and resources to better serve our students. According to the Student Code of Conduct effective consent is:

- Informed;
- Freely and actively given;
- Mutually understandable words or actions;
- Words which indicate a willingness to participate in mutually agreed upon sexual activity.

While every victim will react differently to sexual harassment, rape or sexual assault, these signs might indicate your student has experienced some form of sexual violence:

- Difficulty sleeping or night terrors
- Hypervigilance
- Strong mood swings from appearing happy to anger to depression
- Unhealthy coping mechanisms (alcohol or drugs)
- Especially fearful, could come off easily startled

- Panic attacks
- Disengagement from social circles and refusal to go out in public
- Extreme anger or hostility (more prevalent in masculine victims)
- Disorganized thought content

Your responsibility as an advisor and university employee:

1. Be sure to ask the student if they are okay, safe, or if they need additional resources.
2. Inform the student you must report the incident to the University since you are a mandatory reporter.

An example of what to say: “I need to let you know that I am required to report what you have shared with me to the appropriate OSUIT officials. If you do not wish for your name to be in the report please tell me now, however, OSU policy and federal laws require that I report all of what you have shared with me to the appropriate university officials.”

3. Report the incident to appropriate individuals at OSUIT – www.osuit.edu/incident
(If mentioned include names of individuals involved, date and time of occurrence, location, and contact information of involved parties to include in this report.)

DO NOT INVESTIGATE. You do not have to prove what happened or who was at fault, the appropriate and appointed individuals with OSUIT will investigate.

For more detailed information, please visit: <https://osuit.edu/1-is-2-many/index.php>

On-campus resource

OSUIT Campus PD – 918-293-5000 or **911**

OSUIT Counseling - 142 Student Union - 918-293-4988

OSUIT Behavioral Consultation Team – Student Union Office – 918-293-5287

Off-campus resource

CREOKS Behavioral Health Services - 323 West 6th Street, Okmulgee, OK - 918-456-9250

Okmulgee County Family Resources Center (OCFRC) - 918-756-2545

Wings of Hope – offers counseling services free of charge to survivors.

24 Hour Crisis Line- 405-624-3020.

OSUIT Student Counseling Center

The goal of OSUIT Counseling Services is to provide an open, supportive, and confidential environment to address issues that may interfere with academic and life success. Some of the reasons for seeking counseling include relationship problems, uncertainties about which career to pursue, self-esteem issues, depression, stress, anxiety, and suicidal thoughts.

Counseling services are free to OSUIT students and employees. If the difficulty in question is beyond our resources (for instance, an academic difficulty that could best be helped by tutoring or a problem that deserves more intensive therapy than we can provide), we can refer you to other sources of help.

Counseling sessions are confidential with a few exceptions which include a court order, imminent danger to oneself or others, mandated sanctions and child or elder abuse.

To schedule an appointment contact:

OSUIT Counseling Services - Student Union, Suite 142

Phone: 918-293-4988

Website: <https://osuit.edu/counseling/>

Online Appointment Schedule Request: <https://osuit.edu/counseling/contact.php>

Office hours: Monday – Friday, 8:00 am to 4:00 pm.

Cowboy Cares - 24/7 In The Moment Crisis Counseling and the Virtual Therapy

<https://cowboycarestudents.myahpcare.com/telehealth>

In case of an after-hours emergency, call the Campus Police at 918-293-5000 or **911**, or call **988** for the National Suicide and Crisis Lifeline.

Important Contact Information

The Student Life Department continues to serve the OSUIT community by providing programs and services geared to the needs of all our constituents. Student Life is located in Covelle Hall and provides services that include:

- ◆ Approving Campus Activity Requests
- ◆ Insurance for OSUIT-sponsored trips
- ◆ Calendar of campus events
- ◆ Registering posters, flyers and signs
- ◆ Student organization records

Student Life

Kamie Crawford, Director	918-293-5456
Annette Lorraine Wright, Activities Coordinator	918-293-5361
Kyle Allen, Sports & Wellness Coordinator	918-293-4945
Justin Payne, eSports & Facilities Assistant	918-293-5129
Hope Hubbard, Staff Assistant	918-293-4942

Physical Plant

Connie Roberts	918-293-5410
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(Outdoor Physical Plant Set-Ups - Tables, chairs, tents, generators, lights, etc.)

Student Union Services

Kendra Fitzl	918-293-5292
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(Booking use of Student Union Spaces)

State Room Services

State Room	918-293-5030
State Room Reservations	918-293-5010

Covelle Hall Recreation Center

Front Lobby	918-293-4938
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(General information, intramural information, and more)

Residential Life

Residential Life Office	918-293-4939
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(Questions regarding housing or providing programs in residential locations)

**APPENDIX
STUDENT ORGANIZATION FORMS**

Exhibit A Registration Form

This form must be submitted to Student Life at the beginning of the fall semester AND any time changes occur in officers or advisors, new forms are required.

Exhibit B Fee Allocation Information

Additional information will be provided prior to the allocation process which occurs during the month of September each year.

Exhibit C Advisor Incentive Program

This program was developed to reward advisors for meeting specific goals. This program is available for the fall and spring terms only. To take advantage of this program, advisors must sign an agreement for each term in which they wish to participate.

Exhibit D Student Organization Points Program

This information is provided to help advisors understand how points are awarded for club activities. Any questions concerning points should be directed to the Director of Student Life.

Club Finances

Exhibit E Example of Financial Reports

These reports are emailed to the club Advisor as soon as possible following each month. The advisor should provide a copy of the reports to the club treasurer to include with the club records. It is important that each club review the reports to verify all transactions.

Exhibit F Signature Card

Signature Cards must be submitted to Student Life at the beginning of the fall semester AND at any time changes occur in officers or advisors.

Exhibit G Basics of P-Card for Clubs

This document explains the preapproval and processing procedures for p-card purchases. Pre-approval from the Director of Student Life is required prior to purchases made with the club p-cards.

Exhibit H How to Guide for Transactions in Works

This information was taken from the P-card website and shows a step by step process for approving transactions in Works and uploading receipts.

Exhibit I Disbursement Request Form

This form is required for any payment of funds to be issued from an organization account by any other method of payment other than P-card. The form must be signed by club officers and the advisor prior to submission, these signatures must match those that are on file with your current signature card.

Exhibit J Deposit Transmittal Form

All funds must be deposited using this form. Funds should be deposited at the Bursars Office within 48 hours of receipt. Be sure to include your club account number and your clubs specific deposit code on the form. (Reach out to Student Life for that code to be used)

Exhibit K Procedures for Accepting Donations

This form must be submitted prior to solicitation of donations from business or industry.

Exhibit L Campus Activity Request

This form must be submitted by student organizations prior to planning, hosting, or sponsoring any event, activity or off campus trip. The form may now be submitted online from the Student Life web site. (The paper form provided **MUST** be submitted for any Club Travel)

Club Travel

Exhibit M Day Trip Travel Packet

These documents are required prior to any travel with students on a day trip. This completed travel packet must be submitted to Student Life a minimum of 24 hours in advance of travel.

Exhibit N Overnight Trip Travel Packet

These documents are required prior to travel with students on an overnight trip. This completed travel packet must be submitted to Student Life a minimum of two weeks in advance of overnight travel.

Per Student Services Policy 4-013 Section 1.02, a student must have a 2.0 GPA or better to participate in club travel activities.

Exhibit QReserving a Vehicle

This information is provided to help advisors reserve vehicles for student organization trips. Access to Banner and SharePoint are required to be able to use this feature.

All forms/documents may be found in electronic format at <https://osuit.edu/student-life/forms.php>

**OKLAHOMA STATE UNIVERSITY INSTITUTE OF TECHNOLOGY
STUDENT CLUB / ORGANIZATION
REGISTRATION FORM**

Name of Club / Organization _____
Date _____

Meetings: Location _____ Day _____ Time: _____

Officers: President _____ Email: _____
 Cell Phone: _____

 Vice President: _____ Email: _____
 Cell Phone: _____

 Secretary: _____ Email: _____
 Cell Phone: _____

 Treasurer: _____ Email: _____
 Cell Phone: _____

 SGA Representative _____ Email: _____
 Cell Phone: _____

Sponsor: Name: _____ Department: _____
 Position: _____ Email: _____
 Work Phone: _____ Cell Phone: _____

Co-Sponsor Name: _____ Department: _____
 Position: _____ Email: _____
 Work Phone: _____ Cell Phone: _____

Eligibility Requirements for Members: _____

Purpose of Club / Organization: _____

Student Club/Organization Fee Allocation Process

At the beginning of each fiscal year, the Student Life Department will send out invitations to all OSUIT student clubs/organizations to participate in the fee allocation process. Within the invitation will be a set of instructions and requirements for completing the fee allocation process and a list of all registered/recognized OSUIT student clubs/organizations.

During the fall semester, the Student Clubs and Organizations must go through the Fee Allocation Process in order to receive club funding for the next school year. This process is contingent upon the requirements listed below. All requirements must be completed before any club or organization is allowed to participate in the Fee Allocation process.

1. Your club/organization must have an approved constitution and by-laws on file in the Student Life Office.
2. Your club/organization must be registered with the Student Life Office for the current fiscal year. Student clubs/organizations that have not registered at the beginning of the fiscal year with the Student Life Office will be considered inactive and lose all privileges entitled to registered student clubs/organizations on the OSUIT campus.
3. An audit of your club/organization must be completed or in the process of being completed by the OSUIT Office of Student Life prior to funding allocation.
4. Your club/organization must have been registered with the Student Life Office during the previous fiscal year.

Student clubs will have the opportunity to receive funding through two opportunities.

1. A baseline funding amount of \$1500 will be granted to each club who meets the minimum requirements. Those requirements are:
 - a. All Club paperwork required to be eligible for the fee allocation process (Referenced above) must be on file and updated with the Student Life Office.
 - b. Club/Organization must have participated in 21 Hours annually of campus/community involvement, and hold 3 events annually of industry/career opportunities. (For clubs inactive during summer, requirements are 14 hours campus/community involvement, and 2 events of industry/career opportunity).
 - c. Each Club/Organization must elect one member to be an active member in the OSUIT Student Government Association. (This must be listed on your club registration form on file in the Student Life Office and updated with any changes)
2. For any club/organization not meeting those minimum requirements OR clubs/organizations wishing to receive additional funding will then proceed through the remainder of the Fee Allocation Process, in which they will prepare and present their budget proposal to the Fee Allocation Committee.

** The Office of Student Life will determine the standard for each club as it pertains to the item 1.b. above based on class instruction or the internship situation for majority of your members.

Students from the various OSUIT student clubs/organizations are selected each year to serve on the Student Life Fee Allocation Committee. The Director of Student Life serves as the chairperson for the committee. The other members of this fee allocation committee will be selected based ONLY on the clubs opting to proceed with the Fee Allocation Process in order to receive additional funding or funding not granted using the baseline amount. Additionally, a member from SGA, and PTK will be present on the fee allocation committee. All committee members are required to abstain from any recommendations that directly relates to a club/organization that they are affiliated with.

The responsibilities of the Student Life Fee Allocation Committee Members are the following:

1. Attend all committee meetings
2. Review all Budget Proposal Summaries that have been submitted to the committee
3. Discuss Budget Proposal requests with the club/organization representative and fellow committee members
4. Make recommendations to fund eligible student clubs/organizations based on the information presented by and received from the student club/organization requesting funding
5. Submit their recommendations to the Director of Student Life

Once the committee members have submitted their recommendations for funding to the Director of Student Life, the Director will establish a common average for each budget proposal request. The Student Life Fee Allocation Committee will then meet to finalize all budget proposals and the various clubs/organizations as to their award.



INSTITUTE OF TECHNOLOGY

OSUIT STUDENT ORGANIZATION ADVISOR INCENTIVE PROGRAM

- ◆ Program applies only to fall and spring terms.
- ◆ Maximum 2 advisors eligible per registered student organization.
- ◆ Numbers will be totaled during pre-finals week with stipends distributed in following the semester
- ◆ Awards may be withheld at the discretion of the Director of Student Life with written notice. Appeals may be made to the Dean of Students or the Vice President of Student Services.

BRONZE LEVEL ADVISOR \$150 STIPEND

1. Club has updated registration, constitution and bylaws on file with the Student Life Office.
2. Club has representation at 3 or more Roundtable meetings.
3. Club members volunteer at least 7 hours of campus/community service **or** club hosts at least 1 industry/career event during the semester.
4. Advisors must submit all completed purchasing documentation to the Director of Student Life within 3 business days of each purchase, or within 3 business days of returning to campus if purchase was made during an approved off-campus trip.
5. Club reaches 15 points or higher by the start of pre-finals week.

SILVER LEVEL ADVISOR \$300 STIPEND

1. Meet all Bronze Level requirements.
2. Club members volunteer at least 7 hours of campus/community service **and** club hosts at least 1 industry/career event during the semester.
3. Club reaches 31 points or higher (over 41 points with two advisors, over 51 with three advisors) by the start of pre-finals week.

GOLD LEVEL ADVISOR \$500 STIPEND

1. Meet all Bronze and Silver level requirements.
2. Club reaches 56 points or higher (over 65 points for clubs with two advisors, over 75 points with three advisors) by the start of pre-finals week.



Student Life Club/Organization Points Program

The Student Life Department's Club/Organization Points Program is designed to increase club/organization accountability and participation. Club/Organization points are accumulated from the beginning of the fall semester through the summer semester each year. The year's "Outstanding Club/Organization" will be named at the Annual Student Life Banquet, and is decided exclusively on points accumulated. In addition, these points will have a direct influence on the Annual Fee Allocation Process.

Criteria for earning points:

- ❑ The club/organization must be represented by three or more members per event/activity
- ❑ Any individual holding membership in more than one club/organization may represent only one club at an event/activity
- ❑ A club/organization may not earn more than 16 points for any single event in state and 24 for an out of state event.
- ❑ An activity request must be submitted prior to an event/activity
- ❑ An event verification form must be submitted to the Student Life Department within five business days following the event/activity

Points Allocation Explanation and Examples of Point-Worthy Activities:

1 Point = Club Participation in Student Life Activities

- ✓ Intramural Sports
- ✓ Student Activities
- ✓ Free Massages

2 Points = Club Events *(excludes regular club meetings)*

- ✓ Club Cookouts/Campouts
- ✓ Club Field Trips
- ✓ Club Seminars/Retreats
- ✓ Club Working Sessions
- ✓ Club Meetings with a guest speaker

3 Points = Facilitating Campus-wide Events & Organized Fund Raising

- ✓ Student Club Roundtable *(excludes three-member requirement)*
- ✓ Organized Fund Raisers
- ✓ Two or more clubs sponsoring a campus activity
- ✓ Blood Drives
- ✓ Co-Sponsoring SpringFest, Summer Bash, Welcome Back week, Commuter Appreciation
- ✓ Co-Sponsoring Student Life Activities or Events

4 Points = Community Events

- ✓ Community Events (Chili Fest, Pecan Festival, Festival of Lights Parade, etc.)
- ✓ Volunteerism and or Service Learning
- ✓ Regional, National Conferences/Competitions
- ✓ Community Outreach Events

(Point values are subject to change at the discretion of the Director of Student Life)

FRFPAAC 8.7
FISCAL YEAR 16

OSU and A&M (FROD)
Fund/Account Activity Report
AS OF 29-FEB-2016

01-MAR-2016 09:17:54 PM
PAGE 426

CHART: 4 OSU Institute of Technology
FUND :

ACCOUNT	ACCOUNT TITLE	BEGINNING BALANCE	DEBITS	CREDITS	ENDING BALANCE
119999	Claim On Cash	642.17	2,174.17	.00	2,174.17
160000	Interchart Due/To From	.00	1,376.99	1,376.99	.00
169999	Interchart Claim on Cash	.00	.00	1,376.99	-1,376.99
	TOTAL: Cash & Cash Equivalents	642.17	3,551.16	2,753.98	797.18
	TOTAL: Assets	642.17	3,551.16	2,753.98	797.18
301100	Revenue Control	.00	.00	1,532.00	-1,532.00
302100	Expenditure Control	.00	1,376.99	.00	1,376.99
	TOTAL: Control Accounts	.00	1,376.99	1,532.00	-155.01
	TOTAL: Control Accounts	.00	1,376.99	1,532.00	-155.01
409090	Fund Balance - Agency Funds	-642.17	.00	642.17	-642.17
	TOTAL: Agency Funds	-642.17	.00	642.17	-642.17
	TOTAL: Fund Balance	-642.17	.00	642.17	-642.17
	TOTAL LIABILITIES & FUND BALANCE:	-642.17	1,376.99	2,174.17	-797.18

The balance highlighted on this page is also the balance in the account. If this number is not negative, it means your account is overdrawn.



INSTITUTE OF TECHNOLOGY

SIGNATURE CARD
Student Organization

NAME OF ORGANIZATION

Campus Mailing Address

Account Number

Oklahoma State University Institute of Technology is authorized to recognize the signatures executed herewith as authorization for withdrawal of funds or transactions of any business of student organization listed.

In receiving items for deposit the school acts only as a custodian and accepts no responsibility beyond the exercise of due care. This school or its correspondents may send items, directly or indirectly, to any bank including the payer and accept its draft of credit as conditional payment in lieu of cash; it may charge back any item (returned check) at any time before final payment, whether returned or not; also any items drawn on the University not good at the close of business on the day deposited.

Table with 3 columns: Name (printed), Signature, Date. Rows for Treasurer, President, Advisor, Co-Advisor, and Department. Includes Accounting field.

Basics of Student Organization P-cards

With so many deadlines and priorities in your daily responsibilities, it can be difficult to remember all of the details of allowable or unallowable P-card purchases. This email is intended to provide a quick review of P-card Guidelines pertaining to **student organizations**.

GENERAL

Student organizations may participate in the P-card program if all compliance requirements can be met. Student organizations may use the P-card to pay for supplies, food, student travel, and other expenses as needed by the organization. Alcohol is not allowed.

COMMON ISSUES

- **Paperwork**
After making a purchase, the P-card holder is to retain the P-card itemized receipts for use in this university process. At the end of the P-card cycle, which usually occurs around the 20th of the month, the cardholder is to pair receipts to the Bank of America P-card Statement and turn in all documentation to the Student Life Office.
- **Approvals in Works**
After making a purchase, the cardholder must log in to Works and sign off on transactions.
- **Possession of the P-card**
Student organization cards must be kept by the advisor it is issued to, along with an appropriate receipt/invoice, after the purchase is made.
- **Food, Gifts, Postage, etc.**
If the group and the advisor approve, the organization may purchase food, gifts and other items. Student organizations have a different source of funds than the rest of the University and may purchase food for meetings, etc. There are far fewer restrictions on the types of purchases a student organization can make. Please remember, someone is always watching your purchases and “just because you can buy certain items, doesn’t mean you should.” Work closely with the Student Life Office when deciding if a purchase is allowable or not. If there are questions, feel free to contact the Purchasing Office or the Student Life Office at 293-5266 or 293-4942.
- **Sales Taxes**
It is okay for student organization to pay sales tax. Student organizations are NOT exempt.
- **Purchases from University Departments or Auxiliaries**
The P-card may not be used at these locations. When purchasing from the University or its auxiliaries, you must use the Campus Vendor Invoice (CVI) System instead. *(This includes but is not limited to the Student Union Bookstore, University Dining, the C-Store, Cowboy Café.*
- **Memberships**
Amazon Prime *memberships* are not allowed on the P-card regardless of the source of funding. Sam’s Club *Memberships* are not allowed on the P-card regardless of the source of funding. Costco *Memberships* are not allowed on the P-card regardless of the source of funding.

REMEMBER

- Always follow P-card Guidelines, but if your department has additional requirements, you must adhere to those as well. P-card Guidelines are located at purchasing.okstate.edu/P-card.
- P-card personnel will occasionally inquire about purchases and request receipts and other documentation. She/he may also show up for an unannounced compliance review, request your records and ask to see your P-card. A letter will be generated and routed to certain members of University administration.
- This email is not all inclusive. If you have questions or need clarification, please refer to P-card Guidelines, contact the Student Life Office, your department's finance personnel, or the P-card office.
- The information included in this email is not new information, just clarification of current guidelines.

Works System - Completing Transactions

Important Reminders:

- **All Club Expenses must have Approval before making the purchase, Issuing Transfer, issuing University payment to off campus vendor, initiating a University CVI Charge to on campus department.** While this approval does not have to be uploaded for Works, it still needs to be obtained. Failure to follow this process will result in cancellation of Advisor Club P-card.

- Each Transaction within works will need the following actions taken.
 - o Rename description, assign account number, assign expense code, and verify sales tax included.
 - o Upload an Itemized receipt for each purchase.
 - o Sign Off on each Transaction.

Receipt Requirements

The cardholder is responsible for obtaining original receipts, packing slips, and other required documentation from the merchant to support each purchase. Receipts should include:

- Date
- Merchant Name
- Itemized list of purchases
- Itemized pricing
- Total, including shipping and handling

Original packing lists and any other shipping documentation should be maintained with the official receipt.

Lost Receipts

If a receipt has been lost, the cardholder must contact the merchant and request a duplicate receipt. If a purchase was made online, the cardholder may be able to obtain a receipt from an order history or order status tab on the merchant's website. If the merchant cannot provide a duplicate receipt, the cardholder can contact the bank's Dispute Department at (800) 410-6465 to request a duplicate receipt. (Note – Federal regulations prevent Bank of America from ordering receipts under \$25 that did not require a signature.) Repeated loss of receipts may be grounds for disciplinary action or cancellation of the Pcard.

Billing Cycle

Billing cycle dates usually run from the 21st of the month to the 20th of the following month. If the 20th falls on a weekend or a holiday, the billing cycle ends on the previous business day. Transactions made near the end of the billing cycle may not post until the next billing cycle.

Reconciliation Process

The bank receives transactions daily and routes them electronically through the Works system to the cardholder, approver, and accountant. Cardholder must reconcile receipts and other required documentation and submit it to the accountant. Reconciliation is required at billing cycle end, but departments may require documents be submitted more frequently. Transactions must be reviewed by all parties in a timely manner.

Student Organizations - Prohibited and Restricted Goods and Services

Certain types of purchases are prohibited by the University, Campus Life, or the student organization.

Subject	Information
Alcohol and Tobacco	Prohibited.
Convenience Fees aka Credit Card Fees, Up-Charges, etc.	Although not prohibited, student organization cardholders should always plan ahead to avoid added fees.
Food	Allowed but should be approved by the advisor, treasurer and president.
Gift Cards	<p>Allowed but should be approved by the advisor, treasurer, and president.</p> <ul style="list-style-type: none">• Approval for the purchase should be made prior to the actual purchase of the cards and should include the sponsor and officers of the organization.• There is a limit of \$250 for the total amount purchased at one time and a single card limit of \$25 per card.• Documentation must be maintained for the receiver of the gift card to include the name, address, CWID, and the amount of the gift card. This information should be attached to the disbursement voucher requesting payment or Pcard receipt.• As the cards are issued, the signature of the recipient should be obtained, and the complete log of signatures attached to the purchase documentation. <p><i>(Reference: Additional Gift Card Guidelines)</i></p>

All Transaction should have an Itemized Receipt uploaded for each purchase.

- FOR GIFT CARDS: Include additional documentation in Works per OSU Purchasing Policy and Guidelines.
 - o If transaction for gift cards has been signed off on in Works PRIOR to issuing the gift card to a recipient, the same documentation required to be recorded should be turned in with your BOA Statement Documents that are submitted to Student Life Monthly!

Login to WORKS

Navigate to your cardholder posted purchases, if it doesn't automatically take you there upon login.

Select the Down Arrow on the document number (example - TXN01368578) and select "Allocate/Edit"

The screenshot shows the Bank of America Works interface. The user is logged in as Kamie Crawford. The page title is "Works" and the breadcrumb is "Expenses > Transactions > Accountholder". The main content area is titled "Transactions - Accountholder" and shows a table of transactions. The transaction TXN01368578 is selected, and a context menu is open with the "Allocate / Edit" option highlighted. The table columns include Document, Account ID, Sign Off, Date Posted, Date Purchased, Primary Accountholder, Purchase Amount, Vendor, Comp/Val/Auth, Allocation, Amount Allocated, and Uploaded Receipt. The transaction details for TXN01368578 are: Document: TXN01368578, Account ID: 2393, Sign Off: none, Date Posted: 02/27/2023, Date Purchased: 02/24/2023, Primary Accountholder: Crawford, Kamie, Purchase Amount: 33.57, Vendor: Mailchimp, Allocation: 4 327100- PO#, Amount Allocated: 33.57, and Uploaded Receipt: No.

Rename the description of your purchase so you know exactly what it was for.

Make certain your GL01: transaction code lists your club account number specific to your club.

Make certain the GL02: Expense Code lists 708950 – all club purchases will be coded to this code.

Make certain the tax status lists Sales Tax Included.

Select SAVE & then Close, bottom right.

The screenshot shows the Bank of America Works interface, specifically the "Allocation Details - TXN01368578 - Mailchimp" page. The page displays the transaction details and the allocation table. The transaction details are: Date: 02/27/2023, Source Amount: 33.57 USD, Purchase Amount: 33.57, Tax Amount: 0.00, Allocation Total: 33.57, 100% Variance: 0.00. The allocation table has columns for Comp/Val/Auth, Amount, Sales Tax, Description, GL01: Transaction Code, GL02: Expense Code, and GL03: PO Header. The allocation entry is: Comp/Val/Auth: x | v | x, Amount: 33.57, Sales Tax: 0.00, Description: Club Purchase - Dine Out, GL01: Transaction Code: 4 991750, GL02: Expense Code: 708950, and GL03: PO Header: PO#. The Reference & Tax section shows Reference: Sales Tax Included, Goods & Services: 33.57, Tax Total: 0.00, Use Tax: 0.00, and Shipping ZIP: 74078. The Transaction Detail section shows Goods & Services: Interchange Qualifier 0.00, Price 0, Quantity 0, Total 0.00. The page has "Save" and "Close" buttons at the bottom right.

When back at the cardholder purchases page, select the down arrow on the document number again, and select "Manage Receipts"

The screenshot shows the Bank of America Works interface. The user is logged in as Kamie Crawford. The page title is "Works" and the breadcrumb is "Expenses > Transactions > Accountholder". The "Transactions - Accountholder" table is displayed with the following data:

Document	Account ID	Sign Off	Date Posted	Date Purchased	Primary Accountholder	Purchase Amount	Vendor	Comp Val Auth	Allocation	Amount Allocated	Uploaded Receipt
TXN01368578	2393	none	02/27/2023	02/24/2023	Crawford, Kamie	33.57	Mailchimp	x v x	4 327100- PO#:	33.57	No

A context menu is open over the document number "TXN01368578", showing options: Allocate / Edit, Sign Off, View Full Details, Dispute, Retry Automatch, Add to Expense Report, Attach to Purchase Request, **Manage Receipts**, and Print. The "Manage Receipts" option is highlighted in blue.

Select Add Receipts to upload.

Choose New Receipt to upload a PDF file of your itemized Receipt.

The screenshot shows the Bank of America Works interface with a modal window titled "104336780497 - Receipts" open. The modal contains a table with the following columns: Upload Date, Uploaded By, Receipt Date, File Name, File Size, Description, and Document ID. The table is empty, and a message states "No data available in table". Below the table, there are buttons for "Add", "Remove", and "View PDF". The "Add" button is circled in red, and a dropdown menu is open, showing options: "New Receipt" and "Stored Receipt". The "New Receipt" option is highlighted in blue.

Verify that your document has been uploaded and close the Receipts action box.

The screenshot shows the Bank of America Works interface. A modal dialog box titled "104336260497 - Receipts" is open, displaying a table with one row of data:

Upload Date	Uploaded By	Receipt Date	File Name	File Size	Description	Document ID
02/28/2023	Crawford, Kamie		MailChimp Monthly	193.3 KB		TXN01368578

Below the table, it shows "1 Selected | 1 item | 193.3 KB" and "Show 10 per page". There are buttons for "Add", "Remove", and "View PDF". A "Close" button is circled in red at the bottom right of the dialog box. The background interface shows the "Transactions - Accountholder" page with a search filter on the left and a table of transactions.

Verify once again on the cardholder purchases page that the system saved your uploaded Itemized Receipt for the **correct** transaction.

The screenshot shows the Bank of America Works interface. A table of transactions is displayed, with one row circled in red. The table has the following columns: Document, Account ID, Sign Off, Date Posted, Date Purchased, Primary Accountholder, Purchase Amount, Vendor, Comp|Val|Auth, Allocation, Amount Allocated, and Uploaded Receipt.

Document	Account ID	Sign Off	Date Posted	Date Purchased	Primary Accountholder	Purchase Amount	Vendor	Comp Val Auth	Allocation	Amount Allocated	Uploaded Receipt
TXN01368578	2393	none	02/27/2023	02/24/2023	Crawford, Kamie	33.57	Mailchimp	x v x	4 327100- PO#:	33.57	Yes

The "Uploaded Receipt" column for the circled row shows "Yes". A red line from the text above points to this column. The background interface shows the "Transactions - Accountholder" page with a search filter on the left and a table of transactions.

Select the down arrow on the document number again, and select "Sign Off"

The screenshot shows the Bank of America Works dashboard. The user is logged in as Kamie Crawford. The page title is "Works" and the breadcrumb is "Expenses > Transactions > Accountholder". The "Transactions - Accountholder" table is displayed with the following columns: Document, Account ID, Sign Off, Date Posted, Date Purchased, Primary Accountholder, Purchase Amount, Vendor, Comp/Val/Auth, Allocation, Amount Allocated, and Uploaded Receipt. A transaction with Document ID TXN01368578 is selected. A context menu is open over this transaction, showing options: Allocate / Edit, Sign Off, View Full Details, Dispute, Retry Automatch, Add to Expense Report, Attach to Purchase Request, Manage Receipts, and Print. The "Sign Off" option is highlighted. The taskbar at the bottom shows the Windows search bar and various application icons.

Include any comments you'd like to add on the transaction, otherwise confirm the sign off by selecting "OK".

The screenshot shows the same Bank of America Works dashboard as the previous image. A "Confirm Sign Off" dialog box is open in the foreground. The dialog box contains the text "Sign off 1 transaction(s)." and a "Comments:" label followed by a text input field. At the bottom of the dialog box, there are "OK" and "Cancel" buttons. The "OK" button is circled in red. The background shows the transaction list with the same transaction selected. The taskbar at the bottom shows the Windows search bar and various application icons.

The Transaction will disappear from your list and move on to the next approval in the system. Repeat for any other transactions listed in your Works dashboard.



DISBURSEMENT REQUEST

(Request for Expenditures)
Student Organization Funds

DATE _____ ACCOUNT NUMBER _____

NAME OF ORGANIZATION _____

PAYEE: _____

FEI # _____

REMIT ADDRESS _____

CITY _____ STATE _____ ZIP _____

Description of Expenditure	Amount
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
Total	\$ -

Approved _____
Club Officer - President Ext.

Approved _____
Club Officer - Treasurer Ext.

Approved _____
Club Advisor/Co-Advisor Ext.

Accounting Office
Approved _____

Date _____

PO # _____

Process Date _____

Check # _____

Voucher # _____



**INSTITUTE OF
TECHNOLOGY**

**OSU Institute of Technology
Deposit Transmittal Form**

Date: _____

Department/Organization Account Name:

Account Number	Source of Revenue	Amount
92200 0195492780	Sales Tax	

Checks _____

Cash _____

Credit Card _____

TOTAL _____

COIN	
\$1.00	\$
\$0.50	\$
\$0.25	\$
\$0.10	\$
\$0.05	\$
\$0.01	\$
Total \$	

CASH	
\$100	\$
\$ 50	\$
\$ 20	\$
\$ 10	\$
\$ 5	\$
\$ 1	\$
Total \$	

Rec'd by Bursar Cashier

Date

Club Advisor Signature

Date

Soliciting, Accepting and giving Club Donations

Solicitation: As listed in the Code of Conduct, Student Rights and Responsibilities governing Club processes and policy.

XIII. Other University Policies

C. Solicitation on Campus

No sales or solicitation may be conducted if such is in competition with products or services offered in the Student Union or in conflict with the covenants of the University bond requirements. Bond indentures or buildings financed with self-liquidating bonds pledge all revenues collected in the building to be deposited with the official depository or accounted for by the University administration; therefore, close supervision of sales must be maintained.

Normally, solicitation can be divided in to the following categories.

- 1. Student Clubs and Organizations will adhere to the following:*
 - a. Secure permission from the Office of Student Life.*
 - b. Secure permission from the School Dean or Department Leaders affected by the sale if appropriate. All solicitation in University recognized housing must have primary approval of the Director for Residential Life.*
 - c. Sales solicitation to more than one campus group or residence must have the approval of all student groups and School Dean or Unit Leaders which are affected by the sale. The scheduling of space will be determined by the Office of Student Life.*

2. Private Enterprise: No private enterprise will be permitted to solicit business on grounds, in academic buildings, or in the University Physical Plant service facilities.

Special permission may be granted for sales and solicitation from tables in approved nonacademic public spaces. A rental fee may be assessed by Student Life. Door-to-door sales to students' rooms are not permitted; however, deliveries may be made to rooms.

- Soliciting Donations
 - On Campus
 - Requires Campus Activity Request listing whom it will benefit – Request MUST be approved before any solicitation!
 - Off Campus
 - Email describing in detail the plans for your Donation Drive, plus Campus Activity Request - Request must be approved before any solicitation!
 - Any businesses that donate MUST receive a thank you.
 - If more than one club on a donation drive, or soliciting for same purpose; must solicit different sections of town, or combine efforts and split donations.

Accepting Donations

Donations given to the club must be recorded regardless of type of donation; Monetary, item, product, service etc.

- Fill out Donation Form and keep on hand for club records if donation is an item, product or service.
- Fill out a Donation form and A Deposit Transmittal form and deposit monetary donations into the club account within 24 hours of receiving monetary donation.

All donations received by student clubs require the club to send a Thank You Card to the donor.

Giving Donations

Any student organization receiving allocated monies through the University can **NOT** make donations with these funds. They may make a donation from money collected from other activities. Documentation is required showing the organization has deposited funds from other activities that support the donation. A memo (Signed by club Advisor & Director of Student Life) describing the donation, the payee (with address) & amount should also be attached for documentation. Disbursement Request Form should be completed in full for payment of donation to take place.



INSTITUTE OF TECHNOLOGY

**OSU INSTITUTE OF TECHNOLOGY
DONATION FORM FOR CLUBS**

NAME OF DONOR:

ADDRESS OF DONOR:

NAME OF CLUB RECEIVING DONATION:

DESCRIPTION OF DONATION
(Example: Monetary, Product, Service...)

MONETARY VALUE:

DONATION RECEIVED BY:

SIGNATURE

TITLE

DATE

PLEASE BE AWARE THAT OSUIT CLUBS ARE NOT TAX-EXEMPT ORGANIZATIONS.
THEREFORE, YOUR DONATION IS NOT TAX-DEDUCTIBLE.

Campus Activity Request & Points Verification Forms

With some recent updates in procedures for these two forms, Student Life wanted to provide you with information on the requirements for earning points for your club. (*While both forms are now online web forms and can be completed and submitted online, the Campus Activity Request submitted for any club travel must be in the paper PDF form which included in the club travel packets.*)

Campus Activity Requests: A [Campus Activity Request](https://osuit.edu/student-life/student-life-campus-activity-request.php) (CAR) needs to be submitted when your club is co-sponsoring, hosting, creating, or sponsoring an event. A CAR must be submitted with the Trip Insurance Form anytime a club travels outside the city limits of Okmulgee. (Note: this is the paper form included in the travel packet for club travel) You will receive an email in response to your online form submission for anything other than club travel.

<https://osuit.edu/student-life/student-life-campus-activity-request.php>

Points Verification Forms: [Points Verification Forms](https://osuit.edu/student-life/points-verification.php) (PVF) must be submitted within 7 days of the event and contain the names of at least 3 club members (cannot include the advisor) to earn points. All points are accumulated for the academic year and used to determine the Club of the Year. You will receive an email response to your online form submission.

<https://osuit.edu/student-life/points-verification.php>

Copies of all of the forms can be found on the Student Life website.



INSTITUTE OF
TECHNOLOGY

STUDENT DAY TRIP TRAVEL PACKET

General Instructions:

1. *Club/Organization Trips:* The **Campus Activity Request** will be approved by the Director of Student Life.
Class Trips: The **Campus Activity Request** will be approved by the School Dean or School Assistant Dean approving off campus activity for the class.
2. The **Trip Insurance Reporting Form** and the Campus Activities Request Form must be returned to the Department of Student Life, Covelle Hall, **24 hours before the trip begins** for coverage to be effective. The forms should be delivered in person OR emailed to hope.hubbard@okstate.edu.
3. Only one trip may be reported on one form. All individuals making any one trip must be reported on the same form.
4. All blanks, except reporting date and time 'Student Life Use Only', must be completed.
5. The first and last names of all individuals to be covered must be given. Any changes must be reported before the trip begins.
6. Payment may be made by cash, personal or University check, or charged to a student organization or department account number and must be made before the trip begins.
7. The name and phone number of a contact person must be provided on the "Reported by" line. This person will not be covered under University Travel unless listed as making the trip.
8. If the Student Life office does not have an **Employee Acknowledgment** on file for the employees making the trip, please also sign and print this form! These forms will need to be signed and recorded annually.

Once you have all documentation in this travel packet filled out, please return to Student Life by email or in person - Covelle Hall or hope.hubbard@okstate.edu .



**Trip Insurance
Student Life Department
Covelle Hall
918-293-4942**

When Do I Buy Insurance? Every time you leave Okmulgee city limits on a sponsored trip by a University department or recognized/registered student organization. Insurance must be purchased whether you are traveling in a university or personal vehicle. **Purchase insurance for students going on the trip. Trip insurance must be purchased at least 24 hours in advance of the trip.**

What Do I Need? To purchase trip insurance you must complete both a Trip Insurance Reporting Form and a Campus Activities Request. - **Overnight Trips require additional documentation, please contact the Student Life for that Information.**

Where Do I Buy Insurance?

If the department/Organization has agreed to pay for the insurance through a CVI, the Dean/Advisor must provide the account number to be charged for the insurance on the form. Bring the completed Trip Insurance Form and completed Campus Activities Request to the Student Life Office or email both forms to hope.hubbard@okstate.edu .

Who May Be Covered? Any OSUIT student who is taking a trip sponsored by a University department or recognized/registered student organization is covered by this insurance.

What Is the Cost? The cost is \$.40 per person per calendar day (not 24 hour period). This charge is to be paid at the time the insurance form is filed for departmental or student organization trips.

Requirements for Coverage:

1. The trip must be under the sponsorship of a University department or recognized/registered student organization.
2. The destination must be outside the corporate limits of Okmulgee but within the United States, Canada, or Mexico. Coverage begins at the point of departure.

Exclusions: The following will not be covered:

1. Snow skiing, water sports, and activities as well as intercollegiate athletic competition of any kind including competition between groups or organizations.
2. Trips outside of the United States, Canada, or Mexico.
3. Individuals who are not enrolled students, faculty, or staff.
4. Trips taken in private airplanes.
5. Personal trips or vacations.
6. Partial coverage cannot be extended, wherein the trip would be covered but the activities excluded.

What Means of Transportation is Required? Coverage may be taken on any trip taken private, or in a University, commercial vehicle as long as the trip meets the requirements.

Limits of Coverage:

Accidental Death	\$5,000
Loss of both hands or both feet or entire sight of both eyes;	
Loss of one hand or one foot and entire sight of one eye	\$5,000
Loss of one arm or one leg	\$2,500
Loss of one hand or one foot or entire sight of one eye	\$2,500 (\$1,250)
Physician, surgeon, hospital, and nurse	\$1,000*

*There is a \$25.00 deductible clause on all claims made on this policy.



INSTITUTE OF TECHNOLOGY

Campus Activity Request

When completed, submit this form electronically, to Student Life

Name of Event or Activity: _____

Facility/Area to be used: _____

Event Date: _____ Day of week: _____ Time: from _____ am/pm to _____ am/pm

If Set-Up/Tear-Down Time Required, Please Specify

Date: _____ Day of week: _____ Time: from _____ am/pm to _____ am/pm

Purpose of Event or Activity: (list types of activities planned, i.e., meeting, lecture, etc): _____

Group Submitting Request: _____

Contact Person for Event or Activity: _____ Telephone #: (____) _____

Anticipated Attendance: _____ Open to Public: Yes _____ No _____

Who Will Set-Up? _____ Self _____ Physical Plant Services _____ Other (Please Specify)

Food Services Requested? _____ Yes (If Yes, Contact Food Services @ 293-4964) _____ No

Please List any Special Services or Equipment Requested:

(If you have an Audio Visual Equipment Request, Contact the Campus Library @ 293-5080)

Student Groups Requesting Approval for a Student Organization Sponsored Activity or Trip should submit a completed Campus Activity Request Form to the Student Life Office for Approval. For Student Trip Requests, Trip Insurance Forms should be received by the Student Life Office 24 hours prior to the Date of the Trip. All other requests to reserve Areas or Facilities on the OSU Institute of Technology Campus should be submitted to the Student Union Services Office for Approval.

Responsible Party Designee

Date

University Approval APPROVED OR DISAPPROVED

Date

◆ COPIES OF THIS REQUEST WILL BE FORWARDED TO APPLICABLE OSUIT OFFICES ◆



TRIP INSURANCE REPORTING FORM

INSTITUTE OF TECHNOLOGY

Attach a copy of the receipt from the Bursar's Office if necessary and submit to Student Life with Campus Activity Request

Student Life
Office Use Only
Reporting Date _____
Reporting Hour _____
SL Staff Initials _____

making trip _____
x # calendar days _____
= # of days _____
x .40 per day **\$0.40**
= Total Due _____

Deposit Code : DD51
Department / Club/Org. _____
Charge Acct. # _____
Send bill to: (Name) _____
Campus Address _____

RETURN TO THE STUDENT LIFE DEPARTMENT AT LEAST 24 HOURS PRIOR TO LEAVING CAMPUS. DO NOT MAIL IN CAMPUS MAIL. ALL BLANKS MUST BE COMPLETED.

<u>Departure</u>		<u>Return</u>		Name of Group or Class	Purpose of Trip	Destination
Date	Time	Date	Time			

NAMES OF STUDENTS MAKING TRIP (Use back for additional names, please number.) **ONLY LIST OSUIT STUDENTS .**

1. _____
2. _____
3. _____
4. _____
5. _____
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31. _____
32. _____
33. _____
34. _____
35. _____
36. _____
37. _____
38. _____
39. _____
40. _____

Reported by: _____

Phone: _____

NOTE: The cost is calculated at the rate of \$0.40 **per** person per calendar day. The money must be collected and returned with this form prior to leaving campus.

Exclusions:

1. Snow skiing, water skiing, water sports and activities, rock climbing and intercollegiate athletic competition of any kind, including competition between groups or organizations.
2. Trips outside the United States, Canada, or Mexico. (Trips within the Stillwater city limits is not available)
3. Individuals who are not enrolled students, faculty, or staff.
4. Trips taken in private airplanes.
5. Personal trips or vacation.
6. Partial coverage cannot be extended wherein the trip would be covered but the activity excluded.



INSTITUTE OF TECHNOLOGY Employee/Sponsor Acknowledgement Statement

As a result of the Drug-Free Policy Statement, 1-018, concerning the prohibition of drugs and alcohol in college-owned buildings, facilities, grounds, or other property owned and/or controlled by the college or as a part of college activities, the following expectations apply to you as a representative of OSUIT.

- All OSUIT individuals participating in an OSUIT-sponsored trip are held accountable to all policies of OSUIT as stated in the student handbook and campus policies. In addition, all individuals will obey civil laws at the local, state, and federal level.
- The use of alcohol during any OSUIT-sponsored activity is strictly prohibited, unless an exception has been granted by the Senior Administration, and written approval provided as documentation.
- Any violation of the drug-free policy shall be subject to disciplinary action up to and including termination from employment. In addition, any individual that chooses to violate this policy may be asked to reimburse OSUIT for his/her portion of the participation cost paid by the institution or its affiliates.
- After-hours, OSUIT employees are prohibited from purchasing or providing alcohol to students, regardless of students' age, and from fraternizing with students when alcohol is present.
- It is understood that the use and/or distribution of illegal drugs is expressly prohibited, and may result in immediate termination from employment, and involvement of law enforcement.

I have read, understood, and will comply with the above-mentioned information relating to policies and guidelines of OSUIT.

Print Employee's Name

Date

Employee's Signature

Date



INSTITUTE OF
TECHNOLOGY

STUDENT OVERNIGHT TRIP TRAVEL PACKET

General Instructions:

1. *Club/Organization Trips*: The Campus Activity Request will be approved by the Director of Student Life.
Class Trips: The Campus Activity Request will be approved by the School Dean or School Assistant Dean approving off campus activity for the class.
2. For Overnight Trips - the Campus Activities Request, Trip Insurance Reporting Form, Employee Acknowledgment form, Student Travel form, and Overnight Trip Request **must be returned to the Department of Student Life at minimum 2 weeks before the trip begins.**
3. Only one trip may be reported on one **Trip Insurance Reporting form**. All individuals making any one trip must be reported on the same form.
4. All blanks, except reporting date and time 'Student Life Use Only', must be completed on the Trip Insurance Reporting Form.
5. The first and last names of all individuals to be covered must be given on all forms. Any changes must be reported before the trip begins.
6. Payment may be made by cash, personal or University check, or charged to a student organization or department account number and must be made before the trip begins for the Trip Insurance Reporting form.
7. The name and phone number of a contact person must be provided on the "Reported by" line on the Trip Insurance Reporting form. This employee will not be covered under University Travel unless listed as making the trip.
8. If the Student Life office does not have an **Employee Acknowledgment** on file for the employees making the trip, please also sign and print this form! These forms will need to be signed and recorded annually.
9. A **Student Travel Form** will need to be signed by **each student** accompanying the trip. If student is not 18 years of age, a parent/guardian must sign for them.
10. In order to process overnight travel accommodations for, the **Overnight Trip Request** form will need to be filled out to aid in that process. Employee(s) going on trip please sign as Class/Organization Sponsors, Student Life will obtain all other required signatures.

Once you have all documentation in this travel packet filled out, please return to Student Life by email or in person - Covelle Hall or hope.hubbard@okstate.edu .



**Trip Insurance
Student Life Department
Covelle Hall
918-293-4942**

When Do I Buy Insurance? Every time you leave Okmulgee city limits on a sponsored trip by a University department or recognized/registered student organization. Insurance must be purchased whether you are traveling in a university or personal vehicle. **Purchase insurance for students going on the trip. Trip insurance must be purchased at least 24 hours in advance of the trip.**

What Do I Need? To purchase trip insurance you must complete both a Trip Insurance Reporting Form and a Campus Activities Request. - **Overnight Trips require additional documentation, please contact the Student Life for that Information.**

Where Do I Buy Insurance?

If the department/Organization has agreed to pay for the insurance through a CVI, the Dean/Advisor must provide the account number to be charged for the insurance on the form. Bring the completed Trip Insurance Form and completed Campus Activities Request to the Student Life Office or email both forms to hope.hubbard@okstate.edu .

Who May Be Covered? Any OSUIT student who is taking a trip sponsored by a University department or recognized/registered student organization is covered by this insurance.

What Is the Cost? The cost is \$.40 per person per calendar day (not 24 hour period). This charge is to be paid at the time the insurance form is filed for departmental or student organization trips.

Requirements for Coverage:

1. The trip must be under the sponsorship of a University department or recognized/registered student organization.
2. The destination must be outside the corporate limits of Okmulgee but within the United States, Canada, or Mexico. Coverage begins at the point of departure.

Exclusions: The following will not be covered:

1. Snow skiing, water sports, and activities as well as intercollegiate athletic competition of any kind including competition between groups or organizations.
2. Trips outside of the United States, Canada, or Mexico.
3. Individuals who are not enrolled students, faculty, or staff.
4. Trips taken in private airplanes.
5. Personal trips or vacations.
6. Partial coverage cannot be extended, wherein the trip would be covered but the activities excluded.

What Means of Transportation is Required? Coverage may be taken on any trip taken private, or in a University, commercial vehicle as long as the trip meets the requirements.

Limits of Coverage:

Accidental Death	\$5,000
Loss of both hands or both feet or entire sight of both eyes;	
Loss of one hand or one foot and entire sight of one eye	\$5,000
Loss of one arm or one leg	\$2,500
Loss of one hand or one foot or entire sight of one eye	\$2,500 (\$1,250)
Physician, surgeon, hospital, and nurse	\$1,000*

*There is a \$25.00 deductible clause on all claims made on this policy.



INSTITUTE OF TECHNOLOGY

Campus Activity Request

When completed, submit this form to Student Life

Name of Event or Activity: _____

Facility/Area to be used: _____

Event Date: _____ Day of week: _____ Time: from _____ am/pm to _____ am/pm

If Set-Up/Tear-Down Time Required, Please Specify

Date: _____ Day of week: _____ Time: from _____ am/pm to _____ am/pm

Purpose of Event or Activity: (list types of activities planned, i.e., meeting, lecture, etc): _____

Group Submitting Request: _____

Contact Person for Event or Activity: _____ Telephone #: (____) _____

Anticipated Attendance: _____ Open to Public: Yes _____ No _____

Who Will Set-Up? _____ Self _____ Physical Plant Services _____ Other (Please Specify)

Food Services Requested? _____ Yes (If Yes, Contact Food Services @ 293-4964) _____ No

Please List any Special Services or Equipment Requested:

(If you have an Audio Visual Equipment Request, Contact the Campus Library @ 293-5080)

Student Groups Requesting Approval for a Student Organization Sponsored Activity or Trip should submit a completed Campus Activity Request Form to the Student Life Office for Approval. For Student Trip Requests, Trip Insurance Forms should be received by the Student Life Office 24 hours prior to the Date of the Trip. All other requests to reserve Areas or Facilities on the OSU Institute of Technology Campus should be submitted to the Student Union Services Office for Approval.

Responsible Party Designee

Date

University Approval APPROVED OR DISAPPROVED

Date



TRIP INSURANCE REPORTING FORM

INSTITUTE OF TECHNOLOGY

Attach a copy of the receipt from the Bursar's Office if necessary and submit to Student Life with Campus Activity Request

Student Life
Office Use Only
Reporting Date _____
Reporting Hour _____
SL Staff Initials _____

making trip _____
x # calendar days _____
= # of days _____
x .40 per day **\$0.40**
= Total Due _____

Deposit Code : DD51
Department / Club/Org. _____
Charge Acct. # _____
Send bill to: (Name) _____
Campus Address _____

RETURN TO THE STUDENT LIFE DEPARTMENT AT LEAST 24 HOURS PRIOR TO LEAVING CAMPUS. DO NOT MAIL IN CAMPUS MAIL. ALL BLANKS MUST BE COMPLETED.

<u>Departure</u>		<u>Return</u>		Name of Group or Class	Purpose of Trip	Destination
Date	Time	Date	Time			

NAMES OF STUDENTS MAKING TRIP (Use back for additional names, please number.) **ONLY LIST OSUIT STUDENTS .**

1. _____
2. _____
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37. _____
38. _____
39. _____
40. _____

Reported by: _____

Phone: _____

NOTE: The cost is calculated at the rate of \$0.40 **per** person per calendar day. The money must be collected and returned with this form prior to leaving campus.

Exclusions:

1. Snow skiing, water skiing, water sports and activities, rock climbing and intercollegiate athletic competition of any kind, including competition between groups or organizations.
2. Trips outside the United States, Canada, or Mexico. (Trips within the Stillwater city limits is not available)
3. Individuals who are not enrolled students, faculty, or staff.
4. Trips taken in private airplanes.
5. Personal trips or vacation.
6. Partial coverage cannot be extended wherein the trip would be covered but the activity excluded.



INSTITUTE OF TECHNOLOGY Employee/Sponsor Acknowledgement Statement

As a result of the Drug-Free Policy Statement, 1-018, concerning the prohibition of drugs and alcohol in college-owned buildings, facilities, grounds, or other property owned and/or controlled by the college or as a part of college activities, the following expectations apply to you as a representative of OSUIT.

- All OSUIT individuals participating in an OSUIT-sponsored trip are held accountable to all policies of OSUIT as stated in the student handbook and campus policies. In addition, all individuals will obey civil laws at the local, state, and federal level.
- The use of alcohol during any OSUIT-sponsored activity is strictly prohibited, unless an exception has been granted by the Senior Administration, and written approval provided as documentation.
- Any violation of the drug-free policy shall be subject to disciplinary action up to and including termination from employment. In addition, any individual that chooses to violate this policy may be asked to reimburse OSUIT for his/her portion of the participation cost paid by the institution or its affiliates.
- After-hours, OSUIT employees are prohibited from purchasing or providing alcohol to students, regardless of students' age, and from fraternizing with students when alcohol is present.
- It is understood that the use and/or distribution of illegal drugs is expressly prohibited, and may result in immediate termination from employment, and involvement of law enforcement.

I have read, understood, and will comply with the above-mentioned information relating to policies and guidelines of OSUIT.

Print Employee's Name

Date

Employee's Signature

Date



**INSTITUTE OF
TECHNOLOGY**

STUDENT TRAVEL FORM

I, _____, a student at OSU Institute of Technology, hereby acknowledge and agree to the following conditions set forth by OSU Institute of Technology for student travel:

1. I will be voluntarily participating in travel and activities during the _____ academic year with _____ (name of student group/class).
2. I accept full responsibility for my actions and conduct while traveling, and realize that I am expected to positively represent OSU Institute of Technology by my conduct.
3. I will conduct myself in accordance with the applicable laws and the OSU Institute of Technology Student Rights and Responsibilities.
4. I agree I will not transport illegal drugs, weapons, or alcohol during this activity, nor will I use illegal drugs or alcohol throughout the duration of this activity.
5. I will comply with all rules established by the trip leader, and will treat the trip leader with respect.
6. Should I believe the trip leader is behaving in an inappropriate manner, I will report such behavior to the Director of Student Life immediately (not to exceed 48 hours) upon my return to campus.
7. I certify that I am in stable health and have no physical, mental, or emotional impairments, or concerns that might jeopardize my safety or the safety of others for the purpose of student travel.
8. I understand that there are certain risks inherent in participating in off-campus activities including (but not limited to) illness, accidents and injuries. I voluntarily accept this risk associated with participating in this activity.
9. I understand that if I am found in violation of any of the above conditions, I will be removed from the trip. I understand that I will be responsible for reimbursement of all costs incurred for such a removal.

10. Violation of this policy can also result in judicial action in accordance with the policies stated in the OSU Institute of Technology Students Rights and Responsibilities, including sanctions, suspension, or expulsion from OSU Institute of Technology.

11. In the event of an emergency, the trip leader has my permission to contact the following individual(s):

a. Name: _____

b. Relationship: _____

c. Phone: _____

12. For your safety and the safety of other students traveling, please indicate any physical disabilities or conditions that would affect your participation in off campus activities (For example: heart conditions, diabetes, seizures, recent operations, illnesses, and broken bones.)

13. Do you have any allergies that you would like the college to be aware of during student travel (for example: bee stings, food or medication/drug allergies)?

14. List any medications being taken that you would like the college to be aware of that would affect your student travel. _____

15. I certify that I am at least eighteen (18) years of age and am competent to sign this policy. If I am under age 18, a parent or legal guardian must also sign.

I have read and fully understand this policy and accept all conditions of student travel, and knowingly accept all risks associated with my participation in this activity. If the need arises to respond to accidents and potential emergency situations, I hereby give my consent for any medical treatment that may be required, with the understanding that the cost of any such treatment will be my responsibility.

Student Signature

Date

The student is under eighteen years of age, and I accept this policy on behalf of the student and myself. In the event of an emergency, every effort will be made to contact a parent or emergency contact. If no contact can be made, I give authorization to OSU Institute of Technology to seek treatment for the student.

Parent/Legal Guardian Signature

Date

FIELD TRIP REQUEST

PAGE 2

PARTICIPANTS

STUDENT PARTICIPANTS

*Please attach signed **Student Travel Form** for each student participant*

1	_____
2	_____
3	_____
4	_____
5	_____
6	_____
7	_____
8	_____
9	_____
10	_____
11	_____
12	_____
13	_____
14	_____
15	_____
16	_____
17	_____
18	_____
19	_____
20	_____
21	_____
22	_____
23	_____
24	_____
25	_____
26	_____
27	_____
28	_____

SPONSOR PARTICIPANTS

*Please attach signed **Employee Acknowledge form** for each employee participant*

1	_____
2	_____
3	_____
4	_____

FIELD TRIP REQUEST

PAGE 3

APPROVALS

ORGANIZATION / CLASS SPONSOR

PLEASE PRINT

SIGNATURE

SCHOOL DEAN/DEAN OF STUDENTS

PLEASE PRINT

SIGNATURE

DIRECTOR OF STUDENT LIFE

PLEASE PRINT

SIGNATURE

TRAVEL PCARD HOLDER

(IF EXPENSE INCLUDES AIRLINE OR HOTEL)

PLEASE PRINT

SIGNATURE

DIRECTOR OF PURCHASING

(IF EXPENSES ARE TO BE PAID WITH PCARD)

PLEASE PRINT

SIGNATURE

DIRECTOR OF ACCOUNTING

PLEASE PRINT

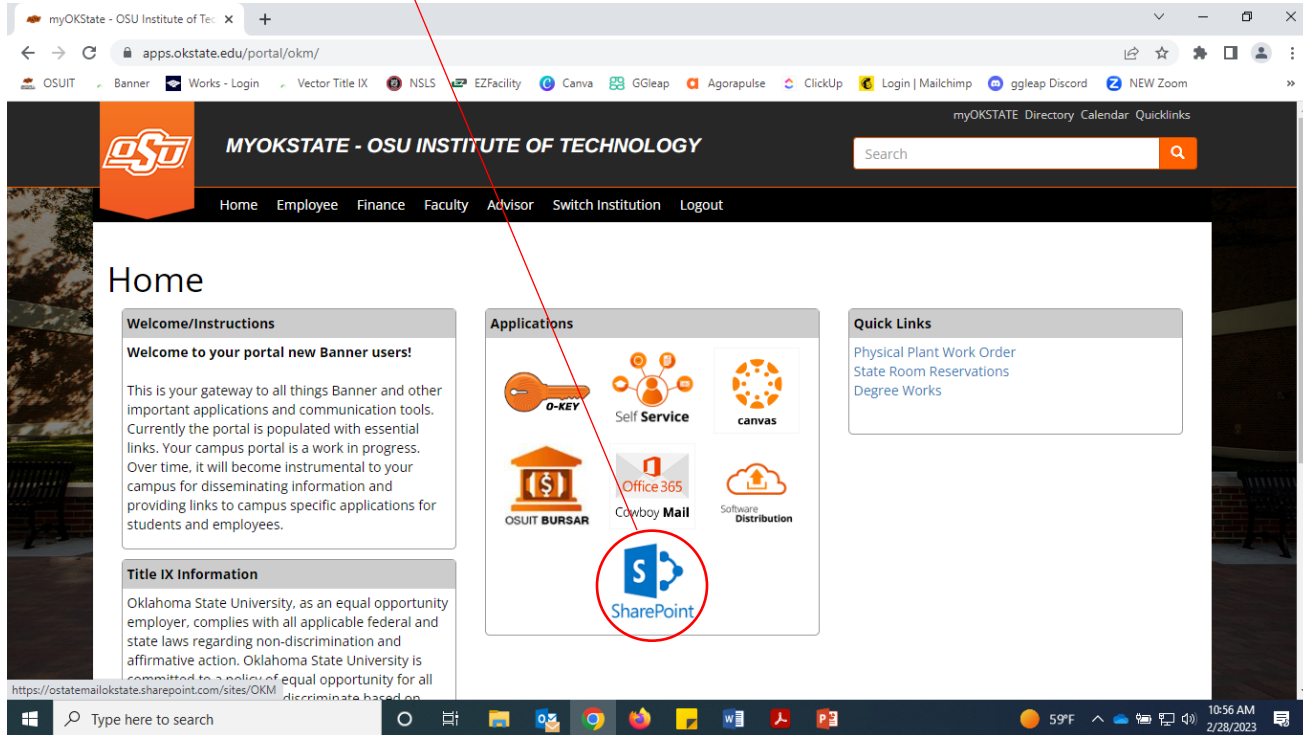
SIGNATURE

Reserving a University Vehicle for Club Use

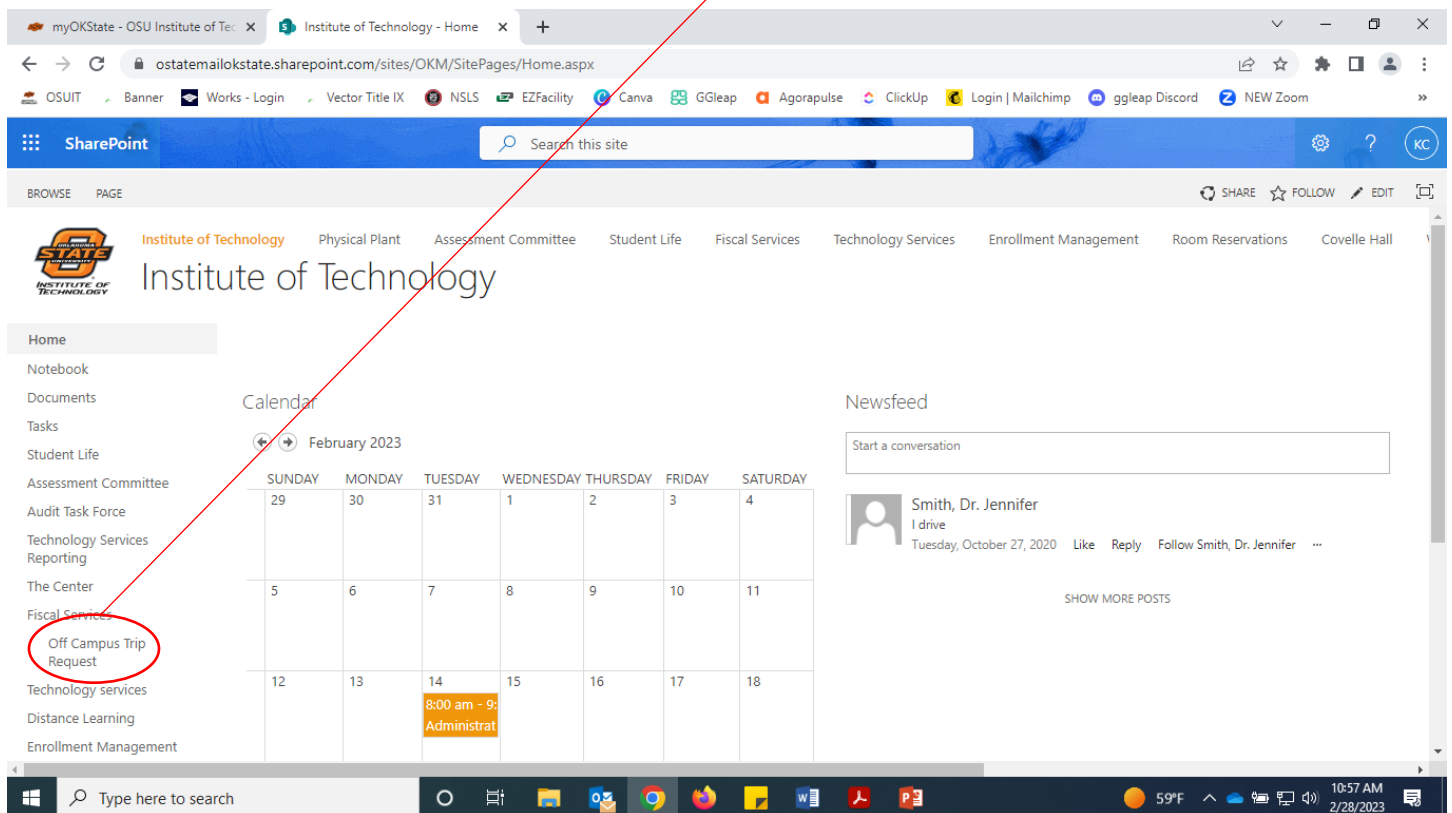
1. Be sure your Club Travel Packets are approved and turned into the Student Life office.
2. ALL Club Trips – Regardless if you are Using University Vehicle or not REQUIRE an Off Campus Trip Request.

Login to Banner

Navigate to the SharePoint App



In the left hand navigation bar select "Off Campus Trip Request"



Select "New"

myOKState - OSU Institute of Tec... Fiscal Services - Off-Campus Trip

ostatemailokstate.sharepoint.com/sites/OKM/FiscalServices/Lists/OffCampus%20Trip%20Request/AllItems.aspx?viewpath=%2Fsites%2FOKM%2FFiscalServices%2F...

OSUIT Banner Works - Login Vector Title IX NSLS EZFacility Canva Ggleap Agorapulse ClickUp Login | Mailchimp ggleap Discord NEW Zoom

SharePoint Search this list

Institute of Technology Physical Plant Assessment Committee Student Life Fiscal Services Technology Services Enrollment Management Room Reservations Covelle Hall Web Council ...

Fiscal Services Not following

Home **+ New** Edit in grid view Share Export Automate Integrate All Items

Off-Campus Trip Request

Employees Mak...	Nature Of Offic...	Destination	Depart Date ...	Return Date An...	Designated Dri...	Drivers Licen
Kenneth Trantham, John Hoover	Recruiting, Skills USA	Atlanta GA	6/18/2023 5:00 AM	6/23/2023 11:59 PM	Trantham, Kenneth	12/31/2023
Kenneth Trantham	Caterpillar Factory Tours	Peoria, Ill	5/30/2023 6:00 AM	6/2/2023 12:00 AM	Trantham, Kenneth	12/23/2023
John Hoover	Caterpillar Factory Tours	Peoria, Ill	5/30/2023 6:00 AM	6/2/2023 12:00 AM	Hoover, John	12/25/2023

Type here to search 59°F 10:58 AM 2/28/2023

Fill out All Form Fields – The more detail the better.

myOKState - OSU Institute of Tec... Off-Campus Trip Request - New

ostatemailokstate.sharepoint.com/sites/OKM/FiscalServices/Lists/OffCampus%20Trip%20Request/Item/newifs.aspx?List=c83e3606-fe9e-4580-849d-bf824504...

OSUIT Banner Works - Login Vector Title IX NSLS EZFacility Canva Ggleap Agorapulse ClickUp Login | Mailchimp ggleap Discord NEW Zoom

SharePoint Search this site

EDIT SHARE FOLLOW

Save Close Paste Cut

Commit Clipboard

Out of State Trip Request

Pages

Site Contents

Recent

Off-Campus Trip Request

Absence and Leave

Workflow Tasks

Recycle Bin

INSTITUTE OF TECHNOLOGY **Trip Request**

Employees making the trip
CWID

Nature of official business
Destination

Depart date and time
Return date and time

Designated driver

Driver's license expiration date

Is this an out of state trip?
Transportation

Lodging needed?

Emergency contact name
Emergency contact number

Type here to search 59°F 11:02 AM 2/28/2023

If you are not requesting use of a University Vehicle Please indicate on the Form Here!

Fill out Remainder of form with required information:

For Overnight Trips Fill this information in with the information in your Overnight Trip Form that was included in your Overnight Travel Packet submitted to Student Life.

If you are not taking an Overnight Trip Skip Down to the Next Step.

Department Leased Vehicle Information

Department leased vehicle number

Estimated Expenses

Per diem (meals)	<input type="text"/>
Transportation	<input type="text"/>
Registration	<input type="text"/>
Other expenses	<input type="text"/>
Lodging	<input type="text"/>
Airfare	<input type="text"/>
Total expenses	0

Traveler comments

Purchasing comments

By submitting this request, I affirm that I will not use a cell phone or hand-held electronic device while operating a

Your Banner Fund number is your club account number

For Club Travel List the Director of Student Life as your Supervisor.

Applicant

By submitting this request, I affirm that I will not use a cell phone or hand-held electronic device while operating a motor vehicle for the University. Failure to comply could result in personnel action. I acknowledge that failure to have a valid driver's license while operating a motor pool vehicle will result in termination. I attest that I have an emergency notification number and emergency contact number entered under my O-Key profile and have my driver's license number and expiration date on file with Human Resources.

Applicant cell phone number

Applicant comments

Banner fund number

Supervisor

End of Form

Supervisor approval

Please Select YES or NO
Supervisor chooses yes to approve trip. APPLICANT MUST FILL IN BANNER FUND NUMBER TO BILL BY CONSULTING WITH SUPERVISOR. SUPERVISOR IS TO VERIFY THAT THE CORRECT BANNER FUND NUMBER HAS BEEN ENTERED.

Select "Submit" at the bottom of the form.