

Student Organization Chartering Process

Truman State University

Voluntary Information Meeting

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graph TD; A[Voluntary Information Meeting] --> B[1. Application]; B --> C[2. Provisional Status]; C --> D[3. Full Charter];
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1. Application

2. Provisional Status

3. Full Charter

Union & Involvement Services
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Introduction

The process for establishing a Recognized Student Organization (RSO) at Truman State University is intentionally designed to:

- Ensure objective decision making in regard to granting organizational charters
- Enhance the inclusiveness and diversity of opportunities available to students
- Safeguard the first amendment rights of all students, specifically in regard to speech and association/assembly.

The chartering process is managed by the Organization Development Team, made up of student employees of Union & Involvement Services. The team is trained on the chartering process in addition to a wide array of resources available to support the effective operation and provide quality experiences for members of student organizations.

The four-phase chartering process (the first phase is voluntary) is self-paced and intended to move students from the point of initiating a new organization to receiving full charter status as quickly and easily as possible. The description of each phase includes four elements:

- Objective (or purpose) of the respective phase
- A complete list of what is required to advance to the next phase
- A list of supports and resources available to founding members to access as they choose; and
- Any additional clarifying notes and/or suggestions related to the process.

Voluntary Information Meeting



Topics Covered/Objective of Meeting:

1. To provide potential applicants with information about the process.
2. Answer questions and inform attendees on basic [Chartering Policies and Standards](#).
3. Introduce staff and resources from Union and Involvement Services.

Additional Information:

- Information Meetings will be held 3 times per year.
 - Dates will be determined on an annual basis and will be made public on the Union & Involvement Services website.
- Attendance at the Information Meeting is **not required** as part of the process; however it is highly recommended by the Organizational Development Team.

1. Application



Objective of Phase: Group formally expresses interest in establishing an organization and completes the informational application to begin the Student Organization Chartering Process. Information gathered for the Organizational Development Team regarding student leadership and contact information assists and supports forward movement toward full charter status.

Required documentation and activities:

- Completed application form available at [\(URL\)](#). All fields are required. Groups submitting incomplete application forms will be asked to provide any missing information prior to advancing on to provisional status.
 - Information needed for the application process includes:
 - Organization Name
 - Purpose of the Organization
 - Name and contact information for two primary leadership roles
 - List of at least three student founding members
 - Organization advisor name and contact information
 - Signify that applicant has reviewed [Chartering Policies and Standards](#). (p. 8)

Support/Resources available:

- Members of the Organizational Development Team are available for consultation as needed.

Application Review Process Notes:

- The Organizational Development Team Leader and the Program Advisor from U&I will review applications on a rolling basis.
- Primary leaders and the applicant for the group will receive written notification that their application has been received and the group has been granted provisional status.
- A member of the Organizational Development Team will be assigned as a liaison to assist the group through the remainder of the process.

Special note: Proposed organizations in which the primary purpose or core activity represents a violation of law or University policy will not be permitted to proceed (example: an underage alcoholic beverage drinking club).

2. Provisional Status



Objective of Phase: To provide newly accepted organizations an opportunity to develop formal guiding documents, operational strategies, and procedures; and to become familiar with University policies, [standards](#) (see p. 8) and processes related to RSOs.

Benefits/Rights afforded with Provisional Status:

- Organizational Development Liaison is assigned to assist the group as needed for completing the required elements of Provisional Status and to provide support as requested with any optional training/development activities.
- Access to a variety of resources related to Organizational and Leadership Development including training modules, checklists and templates (see Support/Resources below.)
- Eligible to request and utilize up to three space reservations in the name of the organization during provisional status (it is recommended, however not required, that at least one of these reservations is designated for a group informational/interest meeting or member recruitment event.)
- Eligible to submit up to three posting requests during provisional status.

Required activities and documentation:

- Attend a Cohort Meeting to review University policies and [standards](#) (see p. 8) pertaining to RSOs, discuss next steps, connect in person with Organization Development Team liaison, answer any questions the organization founders may have, etc.
- Meet with Organizational Development Team Liaison as needed throughout the process (at least one meeting is required) to support and assist as necessary to complete required activities and documents.
- Complete and submit to U&I all compliance documents for record keeping requirements
 - Information form
 - Updated Roster
 - Advisor Agreement
 - Recognition Agreement
 - Anti-Hazing Agreement
 - Non-Discrimination Agreement

- Organizations for which the mission or purpose is centered on physical activities considered inherently high-risk (i.e. rock climbing) must complete the Blackboard module on Risk Management Information and develop a written risk management plan specific to group activity.
 - Module is self-guided and helps students understand the basics of risk mitigation.
- Organizations that anticipate handling money (collect membership dues, open a bank account, make payments related to group, plan fundraisers, buy apparel, etc.) must complete the Blackboard module on Basic Finances/Budget.
- Finalize Constitution/Operating Plan and submit to U&I:
 - A RSO's constitution/operating plan is a foundational document that provides guidance to both current and future members of the organization in fulfilling the mission of the group. The constitution outlines and describes the fundamental operating procedures and set of rules that members have established and agreed upon which describe how their RSO works. The constitution/operating plan should include at minimum:
 - Name and Purpose of the Organization
 - Membership definitions (as determined by group members)
 - Officers and how they are selected (as determined by group members)
 - Advisor role and functions
 - Meeting structure (group defines when/how business will be conducted)
 - Non-discrimination and Anti-hazing statements

And for applicable groups as described above:

- Financial Processes (applicable to groups that will be handling money)
- Risk Mitigation strategies (applicable to groups focused on high risk physical activities)

Support/Resources available:

The Organizational Development Team has designed a variety of training modules, templates and resources available to student organizations that have been granted provisional status, as well as for those that have received their full charter. Organizations are able to access these resources as they see benefit for their group. We encourage organization leadership to review the list of topics and access/complete those most closely related to the organization's mission, purpose, and operations in an attempt to optimize the success and sustainability of the organization. Organization Development Team liaisons are available to assist student organizations who have questions about accessing these modules.

While not an exhaustive list, the following subject matter may be particularly timely and helpful for groups preparing for Full Charter and completing constitution/operational plan.

Organizations are welcome to utilize these resources as they deem necessary and appropriate:

- Risk Management Information/Plan
 - Risk Matrix
 - Mitigation Planning
- Basic Finances/Budget Training
 - Budget Template
 - Financial Planning Template
- Event Planning and Advertising
 - Event Planning Template
 - Advertising Plan Template
- Inclusivity Training
 - Inclusion Template
- Recruitment strategies, planning & events
 - Recruitment planning template

Provisional Process Notes:

- Meetings with Organizational Development Liaisons are driven by the needs of the respective group. The intent of the meeting is to provide support to students as they continue to grow their organization. The following list provides examples of topics that student organizations have sometimes included as discussion items for their meeting with their liaison:
 - Rights and Responsibilities of RSOs (applicable University policy review.)
 - Review and address questions regarding compliance documentation.
 - Suggestions and advice on items that could/should be addressed in foundational documents (constitution, by-laws, operating procedures, etc.)
 - Assist with any questions the group may have.
 - Create awareness of the nature and extent of resources available to Provisional Status groups and RSOs to support organizational effectiveness and sustainability; and to further enhance the experience of organization leaders and members.

3. Full Charter



Objective of Phase: To provide newly formed organizations full benefits and rights as a Recognized Student Organization

Benefits/Rights associated with Full Charter Organizations who maintain [‘good standing’](#)
(see p. 10):

- Access to campus reservations
 - Basic space usage is free to student organizations
 - Additional services and requests may come with additional costs
- Access to U&I copier
- Access to U&I mailbox
- Ability to recruit Truman State University students as members
- Access to publicity according to University policies
 - Digital signage, Sidewalk, Posters and bulletin boards
- Eligibility to request FAC appropriations based on FAC by-laws.
- Placement on official list of RSOs
- Participate in services or events in university facilities that are announced as open to all recognized student organizations (e.g. Homecoming)
- Access to website and organizational e-mail account
- Eligibility for awards or honors presented to student organizations and their members
- Access to Activities Fair registration

Full Charter Completion Results

- Once all signatures have been gathered, the charter document is presented to the newly Recognized Student Organization along with information about how to access resources and support when needed from Union and Involvement Services.
 - Organization will receive an official, fully signed copy of their charter.
- U&I will publicly recognize newly formed organization at the end of the Fall and Spring semesters to the campus community through a variety of methods such as social media announcement, Truman Today ad, etc.
- Organizational information is added to the U&I website.

Additional Resources available:

- Access to U&I Organization Development team for support and guidance
- Quick guide to organizational requirements to maintain RSO in [good standing, Active Status](#) with U&I (see p. 10.)

Chartering Policies and Standards

*Violations of any Chartering policies listed below must be resolved in order to proceed with the chartering process.

Policies and Standards

- The purpose of Recognized Student Organizations (RSOs) is to provide opportunities for student engagement that are not reliant on a University Department/Office beyond a standard, student-selected organizational advisor.
 - Proposed organizations that are affiliated with a specific university department that may influence any aspect of group operations can consult [here](#) for next steps as this does not meet the definition of an RSO.
- All RSOs must have a Truman State University faculty or staff member serve in the role of Campus Advisor.
- RSO must be non-profit in nature.
- The leadership of RSOs must come from within the student body of Truman State University, not faculty/staff or outside entity.
 - Primary leaders identified on the application must be full-time, degree-seeking Truman students.
- Potential organizations will not be accepted if their mission or purpose represent a clear violation of local, state, and federal law. This will also extend to violations of University policies, including but not limited to the Student Code of Conduct, Institutional Compliance/Non Discrimination, etc.
- Proposed student organizations must have a university charter prior to obtaining national recognition including listing on national documentation or websites.
 - Proposals must disclose any external affiliations; provide the constitution and bylaws of any such organization with which it may be affiliated; and certify that all conditions for affiliation meet the standards of the university.
- Recognized Student Organizations that utilize off-campus sites for events and activities involving University students or organizations must make reasonable efforts to confirm that such off-campus locations make best efforts to ensure they are in compliance with [university non-discrimination policy](#).
- The University is not responsible for any contract or the terms of any agreement entered into by an organization without proper authorization by a designated university official.
- Organizations who have been in "[Inactive status](#)" (see p. 10) for more than one year will need to seek reactivation by completing a new application through the Student Organization Chartering process.
- Intentionally providing misleading information as part of this process may be considered a violation of university policy and may be subject to the university conduct process.

Additional Notes to Consider:

- Applicants are encouraged to research current RSO offerings prior to submitting an application.

- Applicant and organization leaders who are currently or anticipate receiving compensation in relation to the organization from a third party entity, not affiliated with the University must complete an annual compensation disclosure statement.
 - Applicants or leaders who receive compensation in relation to this organization will not be precluded from advancing in the process, or from serving in leadership roles within the organization.
- U&I staff will be available to assist groups may be struggling to advance through the process and to discuss options.
- The University is not financially liable for any student organization.
- University recognition does not express university endorsement or approval of the opinions, philosophy, behavior or objectives of the organization or its members.
- University recognition does not authorize the organization or its members to speak or act on behalf of the University.
- Student organizations may be required to provide proof of insurance when activities sponsored by the organization pose an enhanced risk of harm to participants.
- Any group looking to charter an organization under the fraternity and sorority life umbrella must work with Union and Involvement Services staff prior to submission of an application.
- Students interested in forming certain types of athletic organizations, or competitive club sports teams may face encounter additional complexities related to establishing and maintaining eligibility within the respective competitive league, and/or ensuring all NCAA compliance requirements are adhered to. As a result, primary contacts for these groups will be referred by the U&I staff to campus recreation/athletic staff(s) as appropriate for a consultation. U&I may require verification of this consultation prior to finalizing the group's full charter.
- Questions about this process may be addressed to orgs@truman.edu. Members of the Organization Development Team monitor this email account and will respond to your questions. If you have concerns or questions that you feel uncomfortable addressing with U&I staff, please feel free to contact the Vice President for Student Affairs Office at stuaff@truman.edu.

Student Organization Status and Standing Guide

Truman State University

- **Provisional Status** - Student organization is participating in RSO Chartering Process. Group is working on foundational documents and activities and progressing toward full charter. This status includes most of the rights/benefits of a fully chartered RSO.
- **Active Status** - Student organization is a fully chartered Recognized Student Organization and enjoys the full rights/benefits of an RSO. Once fully recognized, RSOs are responsible for maintaining updated information, rosters and other records with U&I (see RSO standing below.)
- **RSO Standing** - Defines the status of an RSO, based on level of compliance with required information and actions. RSO standing is defined as follows:
 - **Good Standing:** RSOs have submitted all required compliance documents. Compliance documents must be updated annually unless otherwise stated, and include the following:
 - Annual Recognition Agreement
 - Information Form (Change of Information if leadership changes occur)
 - Roster (due fall and spring semester)
 - Advisor Agreement
 - Other factors related to good standing:
 - Financial obligations with the University, if applicable, are regularly paid in a timely fashion.
 - RSO Advisors attend required Organizational Compliance Training on annual basis. If advisor fails to attend annually, the organization will need to identify a new advisor.
 - Organization is not currently under investigation, facing allegations/charges, or under sanction(s) related to violations of the Student Code of Conduct and/or University policies enforced by the Institutional Compliance Office.
 - **Bad Standing:** If an organization falls into bad standing, U&I will suspend the rights/benefits of the RSO (i.e. space reservation, listing on website, etc.) until bad standing is remedied. A RSO falls into bad standing when they fail to submit any of the required compliance documents as identified above, within the designated schedule. Upon completion of all required outstanding items, the organization will promptly be placed back in 'Good Standing' with full RSO rights/benefits restored.
 - Other factors that may contribute to bad standing:

- Failure to honor financial obligations to the University (i.e. paying any outstanding balances, if applicable, in a timely manner – within 90 Days.)
 - If an organization no longer has a campus advisor, the RSO may be placed into bad standing until someone has been identified and has complied with training requirements.
 - Organization is currently under investigation, facing allegations/charges, or completing assigned sanction(s) related to violations of the Student Code of Conduct and/or University policies enforced by the Institutional Compliance Office.
- **Inactive Status** - An RSO that has been in “Bad Standing” for two consecutive semesters.
 - Organization contacts and advisor will receive written notification of current standing and shall have an opportunity to remedy their standing prior to “Inactive Standing” being implemented.
 - Organizational rights are suspended (including removal of the organization from the U&I website) until such time that U&I receives an application to re-establish the RSO through the Student Organization Chartering Process.



Form Builder  /

Recognized Student Organization Application

The University believes that student organizations contribute significantly and positively to the quality of the Truman experience through the provision of service opportunities, leadership skills development, social connections, and opportunities to pursue common interests. As a result, the University has designated that Union and Involvement Services (U&I) provide for opportunities to start new recognized student organizations.

It is our aim that the chartering process:

- Be an accessible process that recognizes individualized group need, unique ideas, and possible outcomes while maintaining equality with standardized completion requirements;
 - Guide and support students as they assemble behind a cause, interest, community, or identity;
 - Support student personal and professional development through process completion;
 - Built on values of open mindedness and ethical practice in alignment with Union and Involvement core values of collaboration, customer focus, integrity, inclusion; and
 - The procedure, its operation, and its intent is transparent to those who facilitate and participate in the process.
- Applications in this process should meet RSO criteria as defined in: [Group Types \(Link\)](#)
 - **Following application review, applicants determined to be Departmental CoCurricular Opportunity or Faculty Lead Honor Society may be referred to the appropriate department/faculty for next steps.**

If there are questions about this process, please contact orgs@truman.edu. If you have concerns or questions you feel uncomfortable addressing with U&I staff, please contact the office of Student Affairs at stuaff@truman.edu.

Applicant Name:*

Applicant Email:*

Organization Name: **Per the Student Code of Conduct, the University prohibits any group from beginning with Truman or Truman State University.**

What is the purpose of the organization? **Organizations seeking to become a recognized student organization must be non-profit in nature.**

List three (3) members including name, Truman email and Banner ID: *

Identify two of the above 3 members who will serve as primary officers (primary contact/President, an officer designated for risk mitigation, and an officer designated for financial matters): **The leadership of recognized student organizations must come from within the student body of Truman State University, not faculty/staff or outside entity. Primary leaders identified on the application must be full-time degree-seeking Truman students. U&I will be verifying enrollment status with the Registrar.**

Campus Advisor Name and Email: **All RSOs must have a Truman State University faculty or staff serve in the role of Campus Advisor. It is the applying organization's responsibility to contact this individual and ensure they are willing to serve. U&I staff will follow up with any individual that is identified as an advisor.**

The following questions will help Union & Involvement Services determine the categorization and type of the proposed organization. This application process pertains to RSOs. Applications determined to be Departmental CoCurricular Opportunities or Faculty Lead Honor Societies will be referred to the appropriate department/faculty for next steps.

The proposed organization could not exist (locally or by national requirement) without the existence of a specific faculty, department, major, academic program, or office. *

No Response ▼

The proposed organization requires a faculty or staff recommendation or invitation as a prerequisite for membership. *

No Response ▼

The proposed organization will receive ongoing monetary contribution or financial support from a campus department or office for organizational operation. *

No Response ▼

The proposed organization requires a declared major or minor or other status indicators (eg. points earned from participating in specific academic activities/instruction) as a result of academic work/achievement as a prerequisite to membership.

Not including year in school, completed credit hours, or GPA

No Response ▼

The primary function of the organization's operation is guided by non-student members/departments/or entities*

No Response ▼

The proposed organization's access to space for the specific function of a related department or office is necessary for the organizations's operation. *

No Response ▼

By signing and submitting this application, I verify the following statements are true:

- the information and answers provided are true to the best of my knowledge;
- Chartering Policies and Standards (LINK) have been reviewed;
- understand that U&I Staff will be verifying enrollment status of the 2 primary identified leaders;
- recognize that communication will be directed to and maintained with the 2 primary identified leaders;
- have responsibility to ensure the potential advisor listed is willing to serve as an advisor to this proposed organization;
- will respond to correspondence from U&I Staff in a timely manner as it pertains to this application; and
- understand I will be referred to the appropriate process if the application does not meet the definition of an RSO.

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Submit