



AIS Student Chapters

Faculty Advisor Manual

MARCH 2015

This Faculty Advisor Manual has been created as a resource to assist Faculty Advisors with the organization and guidance of student leaders of the local Student Chapters. The goal is for this to be a dynamic tool that continues to become more useful thanks to contributions of current and former Faculty Advisors. As you read through the different sections, please consider sharing your experiences, tools for success, things you have learned, and best practices. There is a great deal of knowledge among the ranks of AIS Faculty Advisors, and this resource will become more and more helpful as you each get involved.

AIS Student Chapter Faculty Advisor Manual

Introduction

AIS understands that undergraduate and graduate students are critical to the future of the Information Systems discipline. The leadership of AIS has committed the resources necessary to build this vital component of the association, which operates within the larger IS community. AIS also understands that Faculty Advisors are the stabilizing force of the local Student Chapters as the student leadership and membership remains dynamic, and appreciates the time they volunteer and the effort they put forth to help the Student Chapters succeed.

This Faculty Advisor Manual has been created as a resource to assist Faculty Advisors with the organization and guidance of student leaders of the local Student Chapters. Review the Contents outline below to identify the sections that might be most helpful to you.

If you have any questions regarding the content or suggestions for additional topics, please email studentchapters@aisnet.org

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The Role of the Faculty Advisor

The Faculty Advisor plays a vital role in the success of the Student Chapter and its members. First and foremost, Student Chapters must have a current AIS member serving as Faculty Advisor in order to gain or maintain their official status with AIS. Beyond being a name on the Petition for Charter or the Annual Report, there are several things you as the Faculty Advisor can do to support the Student Chapter and, in return, gain a rewarding experience for yourself. Your time is limited, of course, but a little time dedicated to supporting the Student Chapter can go a long way.

As mentioned in the introduction, the Faculty Advisor provides much-needed continuity to a chapter whose leadership and membership is changing on an annual basis. Each year, student members work diligently to improve the chapter and make gains in the areas of membership, programming, and finances. Through your consistent involvement as Faculty Advisor, you can help insure steady progress even when different students are coordinating chapter operations each year. It is important for the Faculty Advisor to ensure that the Student Chapter is keeping thorough records and that new officers receive training and orientation as they assume their roles each year.

The Faculty Advisor also serves as a key liaison between the Student Chapter and the host academic department as well as significant campus organizations and administrators (see Working with the College/University below). Frequently, the Student Chapter counts on faculty involvement with the educational and career-related programming it is required to implement. The Faculty Advisor can help with introductions to other faculty, both within the IS department and other academic departments. In return, the members of the Student Chapter will be able to help the host academic department in many ways, including participating in events that represent the college/university. You may also have developed positive working relationships with administrators in the host department and/or the student activities department, and therefore you may be able to approach these colleagues for assistance and information as you work to support the Student Chapter.

Finally, the Faculty Advisor has the wonderful opportunity to be a mentor for the students as they explore their futures in the IS field. Whether in the form of a chapter program, group discussions, or one-on-one interaction, you have a lot to offer to the student members as they work to apply their classroom learning and identify career possibilities in the IS profession.

Requirements and Expectations of the Faculty Advisor

AIS has only a few specific expectations of Student Chapter Faculty Advisors. They are as follows:

1. The Faculty Advisor must [be a member of AIS](#).
2. The Faculty Advisor must be a faculty member of the host academic department.
3. The Faculty Advisor, as a member of AIS, must agree with the [AIS Code of Research Conduct](#).

4. The Faculty Advisor is expected to ensure the Student Chapter submits the Annual Report of Activities and Membership to AIS.

Support for Student Chapter Faculty Advisors

There are many sources of support for you in your role as Faculty Advisor, including resources within AIS and people on the campus where you work. Within AIS, the Vice President of Student Chapters and the members of the Student Chapter Advisory Board are national volunteers who have significant previous experience working with Student Chapters. They have a wealth of knowledge about chapter programs and activities and can help with ideas or troubleshooting. The AIS Program Director, who works at the AIS Administrative Office in Atlanta, GA, can assist with questions about fees, membership, awards, and the Annual Report. Contact information for all of these people can be found in the "[Contact Us](#)" section of the [AIS Student Chapter website](#) .

The [AIS Student Chapter website](#) contains helpful information for Faculty Advisors about all areas of Student Chapter operations. Specifically, you'll find contact information for other Student Chapters, guidelines for completing the Annual Report of Activities and Membership, model bylaws, and information about AIS awards for Student Chapters.

On the campus where you work, you may find support for your efforts among colleagues in the IS department or other academic departments. It may be especially helpful to talk with other faculty who serve as advisors to academic clubs or other student organizations. There is always much to learn from others' experiences. In addition, on every campus there is typically an administrative department that oversees all student organizations and activities. Often, this department provides informational programs for faculty advisors regarding campus procedures and services provided by the department. Staff may also present organizational development programs for the Student Chapter or assist with planning events on campus. It is a good practice for you, as Faculty Advisor, and the student leaders within the Student Chapter to maintain good communication with this office.

Starting a New Chapter

Interested AIS-member faculty are invited to investigate how a Student Chapter can enhance the advancement of IS on the campus.

The establishment of an AIS Student Chapter on the campus will:

- Increase the visibility of the IS department both on and off campus
- Increase student engagement and enhance IS course enrollment
- Increase students' opportunities to network with IS faculty

AIS Student Chapter members will:

- Gain a competitive advantage to succeed within the IS field
- Gain world-wide recognition thru competition and award programs

- Network with students from around the world
- Expand their career opportunities

AIS Requirements for Starting a Student Chapter

Detailed information about AIS' requirements for chartering a new Student Chapter is available on the AIS website in the [Prospective Schools](#) section. Questions about the requirements or the petitioning process may be directed to the following:

Patrick M. Dockins, MS
Componenet and External Relations Director
Association for Information Systems
aissc@aisnet.org
+1 (317) 220-6977
Skype: ais_patrick

Campus Requirements for Starting a New Student Organization

There may also be procedures or requirements specific to the campus, school/college, or host department as it pertains to starting a new student organization. Therefore, it is important for the Faculty Advisor and Student Chapter officers to determine what those requirements may be and ensure that they are being attended to. It may be helpful for the Faculty Advisor and a student member to meet with an appropriate college/university or host department staff member to discuss these procedures and requirements.

Generating Student Interest

New Student Chapters must have 10 members in order to petition AIS for a charter. Following chartering, the AIS expectation is that Student Chapters will strive to attain membership of at least 25 students. As the Faculty Advisor, it is important that you ensure the Student Chapter develops an ongoing plan for recruiting new members. Ideas for doing so may be found in the Membership Recruitment and Best Practices section of this manual. The following articles may also be helpful:

- [Membership Recruitment Made Easy – Phired Up Productions](#)
- [You Can't Recruit Who You Don't Know – Phired Up Productions](#)

Creating Student Chapter Bylaws

The bylaws provide a framework for the operation and management of an organization. In the case of AIS Student Chapters they outline requirements for officers, elections, committees, and membership dues (if applicable) of the individual Student Chapter as well as some AIS requirements of all Student Chapters.

New Student Chapters must submit their bylaws before they can be chartered, and established Student Chapters should review their bylaws on a regular basis and make updates as necessary according to the procedures for amendments specified within the bylaws.

The [Standard Form for AIS Student Chapter Bylaws.](#), located on the AIS Student Chapter website, provides the template for Student Chapters to follow for their bylaws.

Completing the Petition for Charter

Groups wishing to be considered as a new AIS Student Chapter must submit the Petition for Charter. The process is not complicated; however, it will be helpful to have the following information ready.

1. Mailing address, phone number, fax number, email address, and website address for the potential Student Chapter.
2. Name, mailing address, phone number, fax number, email address, and website address for the person who prepares the petition.
3. Name, mailing address, phone number, fax number, email address, and website address for the Faculty Advisor.
4. Name, mailing address, phone number, fax number, email address, and website address for the Student Chapter President.
5. Full name, estimated graduation date, email address, alternative email address, phone number, and mailing address for each member of the petitioning group (there must be at least 10 group members; use the [template](#) embedded within the Petition to Charter form to collect and submit this information).

You will need an endorsement signature on the Petition to Charter from the Department Chair and the Dean of the School/College. The Student Chapter President and/or Faculty Advisor should set up a meeting for this purpose as soon as possible.

Finally, you will need a check or credit card for payment of the \$495 Student Chapter annual fee.

You may use either the paper form or the online form to submit the Petition for Charter. If you submit using the paper form, the completed form, along with the check for \$495 if applicable, should be mailed, faxed, or scanned/emailed to one of the following addresses:

Association for Information Systems
P.O. Box 2712
Atlanta, GA 30301-2712, USA
studentchapters@aisnet.org

Getting Started-Student Chapter Operations

Once a Student Chapter is chartered, a Faculty Advisor may play a role in helping the group get chapter operations up and running. Whether for scheduling and planning agendas for meetings, setting up the chapter budget, or conducting the first officer elections, there are resources available to help you within other sections of this manual.

- Meetings
- Chapter officers

- Finances
- Events
- Recruitment
- College/University resources
- Goal Setting

Student Chapter Operations

As Faculty Advisor, the Student Chapter leaders will look to you for assistance with various processes and tasks associated with the management of the organization. This section is designed to be your go-to resource as you provide this support. Information about AIS procedures and reports and ideas regarding key areas of chapter operations are at your fingertips here. And be sure to check out the Best Practices section for more ideas from other AIS Student Chapters

Requirements for being an AIS Student Chapter

How to Submit an Annual Report

Each year around May 1, all Student Chapters are required to submit the Annual Report of Activities and Membership (Annual Report) to the AIS Administrative Office. AIS collects this information in order to track membership and programmatic efforts among the Student Chapters across the world. The Annual Student Chapter Awards are also based on the information submitted in these reports.

The compilation and submission of the chapter's Annual Report is the responsibility of the student officers, but as Faculty Advisor, you can help the students establish good habits related to record keeping that will assist them in writing the final report when the time comes. You can also ensure that they are aware of the deadline (April 1st of each year) and guidelines for submitting the Annual Report and encourage the students not to wait until the last minute to start compiling the report. Finally, your signature will be needed on the Annual Report Verification Form, which must be submitted with the Annual Report. Be sure that the Student Chapter allows you sufficient time to review the complete Annual Report prior to signing the verification form, as you are verifying that all the information reported is accurate. Let the students know if you see any need for changes and help ensure that they've followed the specific report guidelines.

The following are tips you can share with the Student Chapter to help them gather the information necessary for the Annual Report.

1. Write a summary of each professional development or IS career program within a week after it happens. Keep notes about the speaker(s); the specific topics discussed; attendance; advertising; sponsorships; partnerships with other student organizations, academic or administrative departments, or local businesses; expenses related to implementation; and program evaluation results.
2. Compile information about each service or philanthropy event throughout the year as it happens. Urge the Student Chapter to find ways to connect some of their service efforts to the IS field. Keep notes about the date, time, and location of the event; the agency,

organization, or initiative to which the Student Chapter provided assistance; the number of members participating, statistics about the number of hours served or dollars raised, partnerships with other student organizations, academic or administrative departments, or local businesses; donations received for the project; expenses related to implementation; and evaluation of the experience from the perspective of both the participating chapter members and the beneficiary of the service project.

3. Maintain records about the Student Chapter's fundraising efforts, including the overall plan for the year, and the details of each specific project, including money spent, money raised, and overall evaluation of the success of the fundraising project.
4. Keep detailed records as to membership, including new members and members who have left the Student Chapter for different reasons. For each member, the Student Chapter will need to report name, address, email address, graduation year, and current GPA. Help the Student Chapter Secretary develop a systematic way for collecting this information on a routine basis, perhaps at the beginning of each semester, in addition to when a student first joins the organization, so that the process of collecting it for the Annual Report is not cumbersome.
5. Strongly encourage the Student Chapter to set goals for its activities each year, including the development of specific objectives for achieving them, because they will be expected to report on this in the Annual Report.
6. Ensure that the Student Chapter creates a budget each year and maintains detailed records of revenues and expenses, including a comparison to budget figures. The Student Chapter will be required to report on its finances for the Annual Report.

How/When to Renew Student Chapter Status

Why Renew?

The benefits of maintaining your organization's status as a Student Chapter of AIS are many:

- The Student Chapter and its members benefit from the reputation of AIS.
- The presence of an AIS Student Chapter at the institution makes a positive impression on potential IS students and faculty.
- Student Chapter members benefit from chapter programs and activities, not only because of the educational content but because of the opportunity to plan and implement these activities.
- Student Chapter members can network with fellow IS students and faculty from around the world.
- Student Chapter members can attend conferences to learn from faculty and experts from around the world.

How to Renew your Student Chapter Status

There are just two things a Student Chapter needs to do to renew its status with AIS each year.

1. Submit the Annual Report of Activities and Membership
2. Submit the annual organization fee ([Organizational Fee](#))

The Annual Report must be submitted to AIS headquarters on time!

How to Apply for AIS Student Chapter Awards

AIS sponsors several awards to recognize Student Chapters overall achievement as well as accomplishments in specific programming areas. The awards are presented each year at a special ceremony, and several of the awards have multiple recipients. Recipients are presented with a plaque or certificate as well as a special AIS logo to be used on their website.

Eligibility for Awards

Any Student Chapter that receives recognition and/or maintains good standing with AIS by March 1 of each year shall be eligible for awards for that year.

How to Apply for Awards

Award selections are based on the Annual Reports submitted by Student Chapters for the most recent academic year. These reports are due by April 1st of each year. The process for completing this report is not complicated, but some preparation and attention to record keeping throughout the year will make it even easier.

Award Categories

Listed below are the various awards presented to Student Chapters each year:

- Student Chapter of the Year
- Best New Student Chapter
- Distinguished Student Chapter
- Outstanding Student Chapter
- Outstanding Professional Development
- Outstanding Membership Activities
- Outstanding “Careers in IS”
- Outstanding Community Service
- Outstanding Fundraising
- Outstanding Communications

For more information about each of the award categories, visit the [AIS Student Chapter website](#).

Award Selection Process

Award recipients are chosen by a committee chaired by the Awards Chair from the AIS Student Chapter Advisory Board. The Awards Committee is comprised of the following people:

- Three AIS student chapter faculty advisors

- Three AIS student chapter members
- One industry representative selected from AIS industry sponsors by the AIS office
- One representative from the AIS council to be nominated by the AIS president
- One representative (conference or program chair) from the host conference
- AIS President elect

Committee members use a defined set of criteria to evaluate the Annual reports and will recuse themselves from voting on submissions from their home institution.

Student Chapter Finances

One area in which the Faculty Advisor may provide guidance to the Student Chapter is the area of finances. A sustainable financial model is critical to the Student Chapter’s success and longevity. The three key areas of Student Chapter finances are budgeting, policies and procedures, and fundraising.

Budgeting

Every Student Chapter should have a budget that is reviewed and approved each year. It is good practice to ensure that the budget is balanced and even better practice to plan for revenues to exceed expenses. See a basic budget template below.

AIS Student Chapter Budget			
	Budget	Actual	Difference
Revenue			
Member Dues	400		
Student Activity Fee Allocation	150		
Fundraising-Arena Concessions	300		
Fundraising-Silent Auction	150		
TOTAL Revenue	1,050		
Expenses			
AIS Annual Organizational Fee	495		
Service Program – Back Pack Activity	150		
Fall Speaker Program	100		

Spring Career Program	100		
Flyers, Supplies for Info Fair Table	75		
Miscellaneous Expenses	75		
TOTAL Expenses	995		
Ending Balance	55		

REVENUE - Student Chapter Member Dues

AIS does not require Student Chapters to charge member dues. The decision whether or not to do so is strictly up to each Student Chapter. If a Student Chapter is considering establishing member dues, it might be helpful to contact Student Chapters of similar size, with similar programming/activity patterns, or from similar institutions. You may also contact the AIS Program Director or Vice President for Student Chapters for guidance related to chapter dues. Some Student Chapters have learned that when they started charging a minimal amount for chapter dues, chapter members took their involvement more seriously and got more involved, and participation increased.

Revenue raised from dues should be allocated very purposefully to support the Student Chapter's efforts in the programming areas outlined in the AIS Student Chapter Annual Report. It is important that the amount charged for dues does not dissuade an interested student from joining. In addition, if the Student Chapter does decide to collect member dues, it is important for the officers to enforce this expectation and ensure that all members have paid their dues by the established deadline. The AIS Standard Form for Student Chapter Bylaws contains suggested language for adding this section to your chapter's bylaws.

REVENUE - Fundraising

There are many possible ways for the Student Chapter to raise funds apart from charging dues. This type of fundraising is different than philanthropic fundraising. See the Fundraising section for more information about fundraising.

REVENUE - College/University Funding

The Student Chapter may or may not have the ability to apply for funding through the college/university, the host department, or the student governing body. You and the Student Chapter officers should familiarize yourselves with these opportunities and any related procedures and determine whether or not the Student Chapter will apply for funds each year.

EXPENSES - AIS Student Chapter Fee

Each AIS Student Chapter must pay an annual fee by the designated deadline each year, so this expense should always appear in the Student Chapter budget.

EXPENSES - Programming Expenses

These expenses will vary for each Student Chapter depending on their goals related to programming, logistics related to their meetings, or their involvement in campus-specific events or activities.

If there are annual programs in which the Student Chapter participates, make note of results from the previous few years as you plan for expenses (and revenue, if applicable). For new programs, Student Chapter officers should take care to thoroughly investigate possible expenses and ensure that the budget can accommodate them.

EXPENSES - Other Expenses

There may be other expenses that the Student Chapter will incur throughout the year, and those that are known in advance should be incorporated into the budget. It also may be prudent to include a small amount for unanticipated miscellaneous expenses.

For more information and ideas about budgeting, see the Best Practices section.

Financial Policies and Procedures

With Student Chapter leadership and membership changing frequently, it is important for the Student Chapter to establish and document policies and procedures related to financial matters to help ensure consistency and efficiency in this area of chapter operations. Policies and procedures related to member dues, if applicable, are especially important for all members to understand; others such as those related to expense approval or reimbursement and tracking all incoming and outgoing funds are more relevant to Student Chapter officers. Detailed below are a few examples of financial policies and procedures that may apply to the Student Chapter with which you work.

Setting Up Accounts

If you are working with a new Student Chapter, one of the things you'll be involved with is helping the Student Chapter officers to set up the financial accounts for the chapter. If there are multiple options available, you'll want to discuss them with the student leaders to determine the best set up.

Setting Up Accounts – Host Department or Campus-Based Accounts

In some cases, the Student Chapter account will be a part of the host department account, especially when the Student Chapter is just beginning. In other cases, the account may be housed under the college/university. This type of set up may or may not be required. If this applies to the Student Chapter with which you work, the most important thing is to work with the appropriate

staff person to learn about any policies and procedures and work with him/her to get the account set up. Things you'll want to be sure you understand include:

- how money can be deposited or withdrawn/spent from the account
- whether a minimum balance is required
- whether the Student Chapter is considered a sales tax exempt entity (be sure to get the appropriate identification numbers if this is the case)
- how long it takes to get a check issued from the account and if a purchase order is necessary
- procedures related to budget requests for the next fiscal year

Setting Up Accounts – Off-Campus Bank Accounts

Some Student Chapters establish checking or savings accounts at a local bank. With this type of account, things you may want to discuss with your banker are balance requirements, account signature authority, and electronic banking options.

The steps involved in establishing a Student Chapter checking or savings account are as follows.

1. Obtain an Employment Identification Number (EIN) from the Internal Revenue Service.

This is like a Social Security number for your chapter. Keep in mind, your organization is responsible for understanding all requirements and obligations for filing reports to the IRS. Applications for an EIN can be retrieved at <http://www.irs.gov/pub/irs-pdf/fss4.pdf>. For detailed instructions for completing the application, visit <http://www.irs.gov/pub/irs-pdf/iss4.pdf>. There is no fee associated with the application process, and there is an option in the Reason for Applying section of the form to indicate that you are applying for banking purposes only.

1. Obtaining an EIN does not mean a registered organization is a non-profit organization or has tax-exempt status. There is a difference between an EIN and a tax exempt identification number. For more information tax exempt status for not-for-profit organizations and how to apply, visit <http://www.irs.gov/pub/irs-pdf/p557.pdf>. This process is much more complicated than the process for applying for an EIN, and Student Chapters who are considering doing this are advised to seek legal counsel.
1. Research banks to find one that will give you the best benefits. Some banks may give small clubs and groups many of the same benefits as incorporated organizations. It may be helpful to mention that you are affiliated with your college/university and bring documentation that verifies this relationship (a printed letter on letterhead from a professional staff member in the student activities or host department is ideal).
1. Open the account. Be sure to keep detailed records of any account information or regulations in a safe place. Take the time to orient any chapter officers as to the account set-up and procedures.

Regarding the account signature authority, it is important to ensure that procedures for changing the authorized signatures are completed immediately following officer elections. You may want to consider having the Faculty Advisor named as an authorized signature, due to the high level of turnover among Student Chapter officers. Having the Faculty Advisor's name on the authorized signature list does not necessarily mean he/she will have to sign every check issued by the Student Chapter. Policies can be established for when the Faculty Advisor must sign the check along with the Student Chapter treasurer (e.g., for checks over \$500), but if necessary, he/she can access the account at any time (e.g., if the outgoing treasurer leaves for a semester overseas before the signature change is executed). AIS recommends that Student Chapters establish a policy requiring two signatures for the withdrawal of funds no matter what the amount.

There are pros and cons to the different types of accounts, and you may want to consult with other AIS Student Chapters or the Best Practices section to learn more about different practices.

Tracking Income And Expenses / Money Handling

Documented financial procedures should delineate the processes for approving expenditures of Student Chapter funds and for reimbursing members or the Faculty Advisor for outlays of personal funds for organization purposes.

Some expenses are approved in general by way of the budget. However, even for those projects for which funds have been specifically allotted, it is advisable to have the responsible officer submit a detailed list of requested expenditures for approval. This process does not have to be complicated; it can be as simple as having the Student Chapter president and/or Faculty Advisor review and approve the request. Even the simplest policy will help guard against fraud or spending that leads to problems.

The same is true for procedures related to expense reimbursement. Documented policies should detail what types of personal expenditures will be reimbursed and the process for requesting reimbursement. It is always preferable to spend Student Chapter funds directly, but having these procedures documented will help keep track of expenses.

With a host department- or college/university-based account, there may be very specific procedures related to expense approval and/or reimbursement, so it will be important for the Faculty Advisor and Student Chapter officers to know these.

For incoming checks, it is important for the receiver to stamp the checks "For Deposit Only" as soon as they are received. Until the checks are deposited, they should be kept in a locked box or drawer. Prior to depositing a check, the person making the deposit should make sure it the check is written correctly, is signed, is made out to the right payee, and is written for the correct amount. Deposits (checks and cash) should be made at least weekly, and during times where more funds are coming in (membership dues deadline, fundraiser), they should be done daily. It can be very helpful to keep copies of all checks deposited along with the deposit slip. Having all this information can help resolve any questions that may arise after the deposit has been made.

When handling incoming cash, it is important to keep all cash in a locked drawer or cash box. A cash box should be kept in an enclosed place when not in use, where it is not visible to passersby. A receipt book with carbon copy forms, or some other means, should be used to document cash receipts. This receipt becomes a record not just for the person making the payment but for the Student Chapter. When taking the cash to the bank for deposit, the person making the deposit should keep the money in a non-transparent envelope.

If the treasurer is responsible for tallying incoming payments and making deposits, then a different officer should be responsible for tracking member payments or other payments in the chapter's financial record books. Incoming cash and checks should be processed and recorded as quickly as possible after they are received. Once they are processed, they should be placed in the possession of the treasurer or the person responsible for making deposits.

Member Obligations/Accountability

If the Student Chapter decides to assess member dues, the general information related to dues should be included in the Student Chapter bylaws. More specific procedures should be conveyed in writing to Student Chapter members on an annual or semester basis, depending upon how frequently the Student Chapter collects dues. Each time dues are collected, members should be informed as to the due date, any early payment discounts or late payment penalties, and any ramifications for failure to pay dues.

If members are expected to pay dues, there should be established and documented consequences for a member's failure to do so. More importantly, those consequences must be enacted consistently. If a member has extenuating circumstances, the president or treasurer may certainly consider those and make a decision as to how to proceed. The most important thing is to ensure members understand the expectations and procedures and that the officers implement those procedures consistently.

College/University Requirements

If the Student Chapter's financial account is housed under the host department or the college/university, there may be additional policies with which the Faculty Advisor and student officers should be aware. Some examples of these are:

- Required use of purchase orders
- Prohibitions on use of funds for certain kinds of expenses (e.g., alcohol, presentations by political candidates, events that are inconsistent with college/university mission)
- Annual budget submitted by specific deadline
- Required attendance by officers and/or advisors at training program

Fundraising

TIPS FOR PLANNING YOUR STUDENT CHAPTER'S FUNDRAISER

1. Determine the specific need or reason for fundraising and what type of fundraiser best fits your Student Chapter.
 - What interests, talents or skills do members have?
 - How large is your chapter?
 - How busy are your members?
 - What things might other students be interested in purchasing?
 - How soon is the money needed?
2. Establish a specific, realistic financial goal for the fundraiser.
 - How much money is needed for the designated purpose?
 - If applicable, set a per-member goal amount and an overall amount.
3. Develop a plan for the fundraising project.
 - What is the best timing for the fundraiser (fall, spring, etc.)
 - How long will the project last?
 - Would it be better to do one bigger project or a few smaller projects?
 - What supplies will be needed? Will you have to buy them or could they be donated?
 - How will member involvement be coordinated?
4. Promote the fundraiser
 - Who are your target audiences?
 - What are the various advertising and promotional avenues available to you?
5. Evaluate the project
 - Keep records of what aspects of the project went well and what did not go well.
 - Maintain a list of people who assisted, companies that donated things, etc.

FUNDRAISING DO's and DON'TS

DON'T...

...Take on a fundraising project that is too big and involved for your Student Chapter

...Choose a project that will cost too much to implement

...Schedule your project at the same time as other major projects, if possible

...Drag out the timeframe for the fundraising project too long

DO...

...Involve Student Chapter members in discussions of fundraising ideas

...Think positively – and focus on how funds raised will help achieve the Student Chapter's goals

...Ask alumni or businesses in the community for donations (prizes, supplies, etc.)

...Consider partnering with other campus organizations

...Follow campus, city, and state policies or laws regarding fundraising events

...Thank people who contributed to the fundraiser

...Recognize members/advisors that made significant contributions to the project or met individual fundraising goals

FUNDRAISING IDEAS

Here are some ideas for fundraisers. Some require an initial investment, others do not. Be sure to check into any college/university rules or policies about fundraisers, especially events that involve food, raffles, or the use of the institution's name or logo.

- Fundraising Nights or Days at local restaurants (bring in a coupon or flyer and X% of order will go to fundraiser)
- Work concessions or clean-up shifts at on- or off-campus arenas, stadiums, or other venues
- Silent Auction
- Candy Sale (or popcorn, etc.)
- Carwash
- Flower or balloon delivery (Valentine's Day, other holidays)
- _____-a-thon (dance, walk, video game, etc.)
- Tournament (corn-hole, volleyball, 3-on-3 basketball, etc.)
- Exam Week Care Packages
- Late night pizza sale
- College/University paraphernalia sale (water bottles, key chains, etc.)
- Pancake breakfast, spaghetti dinner, etc.
- Dunk tank
- Rubber duck race
- Dog wash
- Leaf raking or sidewalk shoveling
- Small Business Consulting
- Website design and maintenance
- Computer tutorial service

For more ideas from other AIS Student Chapters, refer to the Best Practices section.

For questions related to Student Chapter finances, you may contact any of the following:

Patrick M. Dockins, MS
Component and External Relations Manager
Association for Information Systems
(317) 220-6977 student_chapters@aisnet.org

AIS Council Contact:
Dr. James Parrish
Nova Southeastern University
VP Student Chapters
[Email: jlparish@nova.edu](mailto:jlparish@nova.edu)

Recruitment

Recruitment is the lifeblood of the Student Chapter. The Student Chapter cannot exist without members, and thus it is crucial for the current members to continuously work to bring in additional members to ensure its future. Most think about recruitment as an event or series of events held at the beginning of the academic year, the beginning of each semester/term, or at some other specific time. But the Student Chapters that are most successful in this area know that recruitment is a year-round effort and mindset related to meeting and engaging potential members and involving all Student Chapter members in that effort.

Continuous Recruitment Efforts

What are Student Chapter members doing on a regular basis to meet potential members? Whether they realize it or not, members encounter potential members all the time...in class, in the residence hall, in other extracurricular organizations, at the gym, in the cafeteria, and many other places. But, are they doing anything to capitalize on this potential? Chapter officers should take the time to discuss ongoing recruitment with members and teach them how to approach potential members to talk about AIS and why they are involved. Most imperative to success in this aspect of recruitment is commitment from all members to participate and work toward chapter goals. As members make connections with new people they can invite them to Student Chapter-sponsored programs or community service projects, where they can meet additional members of the Student Chapter and learn more about the organization. Then, the Student Chapter can extend an invitation for the student to actually join. There is no restriction as to when people may join. Many erroneously think this can only happen at a few specific times of the year. The Faculty Advisor should help the Student Chapter break this habit, if it is in place, and encourage the chapter to not only have regular membership drives each semester but also invite students to join whenever their interest becomes known. A membership list should be maintained and available to the AIS Office upon request.

One of the best pools of potential members is the freshmen within the host academic department, and Student Chapter members have many opportunities to interact with these students. They can offer to assist the host academic department with summer and/or fall orientation or welcome events, host their own welcome event for the freshmen, volunteer to serve as mentors to the new students, and get to know them in classes and through other departmental activities. Student

Chapter members may even have the opportunity to meet potential members before they set foot on campus at admissions-related events hosted by the academic department.

One specific way to maximize these kinds of opportunities to interact with potential members is to create a polo shirt, button-down shirt, t-shirt, or fleece pull-over with the Student Chapter's name on it. Members should wear the shirt or fleece upon occasions when they are specifically volunteering at an event on behalf of the Student Chapter, when they attend meetings of other organizations to which they belong, or just when they think they might have the opportunity to meet new people. Somebody they meet might ask about the shirt, thereby presenting the golden opportunity to tell that person about the Student Chapter and its activities. Members should be prepared for these kinds of situations; it never hurts to practice or role-play what to say.

Recruitment Events and Activities

In terms of specific recruitment events, there are a few keys to success.

- **Location**

The location of the event can make a big difference in attendance. Meet the potential members where they are. This may be a residence hall lounge or lobby, the campus recreation center, a lobby in the building where IS classes are held, or a quad or lawn outside where many students hang out. This may also be on Facebook, Twitter, or another social media site. This could also be the Student Chapter's website. It is important that the Student Chapter have a section of the website designed for potential members who are interested in learning more about the organization. The easier you make it for potential members to interface with the Student Chapter, the more likely it will be that great connections are made.

- **Interaction with members**

Provide opportunities at the recruitment event for current members to interact with the potential members. It will likely be more effective for a potential member to hear about the Student Chapter's programs and activities and the benefits of membership in a one-on-one or small group conversation versus sitting and listening to a speech by somebody at a podium or by watching a PowerPoint or Flash presentation. In this case, individual members must be prepared to have friendly and purposeful conversations. This can take practice, so make sure the Student Chapter takes some time to prepare in this way. Role playing can be helpful, as can group discussion about why members decided to join and what they've found beneficial about membership.

- **Planning and Promotion**

It is very helpful to have a strategy and advance plan for recruitment events. For example, if there is a certain group of students that the Student Chapter is targeting for membership, plan the location and nature of the activity in relation to that group. Or consider a series of events with an increasingly purposeful recruitment focus. Plan a dual

purpose for some programs or activities, such as professional development programs or community service activities, and invite potential members to participate. Advance planning also helps ensure effective marketing and promotion of the recruitment events. There are many different ways to get the word out about your events:

- Use a list of potential members generated through ongoing recruitment and send personal messages to those people. Even better, have members deliver invitations personally to people they've met.
- Use various social media outlets like Facebook or Twitter to get the word out about recruitment events and/or other programs that are open to all students.
- Seek permission from faculty in the host department to announce events in IS classes or post information on bulletin boards in the classrooms or department office.
- Post information about Student Chapter events and programs on any college/university-wide activity calendars (seek more information about this opportunity from the campus office that works with student organizations)
- Include information about upcoming events on the Student Chapter website. Be sure to include details about the event time and location.
- Also take advantage of any student activity fairs or other such events implemented by the student government or the student activities office.

- **Follow Up**

Timely follow up with potential members in attendance at recruitment events is a key factor in a Student Chapter's success. Prior to each event, plan which member will make personal contact with each attendee to answer questions or offer an invitation to the next event or even to join the Student Chapter.

Ideas for Recruitment Events

Recruitment events can be very simple or more involved. It is important to plan financially for recruitment and allocate an amount for expenses that is sufficient to meet the Student Chapter's recruitment goals. And when free opportunities to promote the organization present themselves, the Student Chapter must be ready to take advantage

Here are some ideas that other chapters have found to be successful. For more detailed information and ideas, visit the Best Practices section.

- Table at college/university-sponsored student activity fair
- Student Chapter members get involved in freshmen orientation activities
- Student Chapter members volunteer to help with freshmen move-in to the resident halls
- Host a reception to welcome new students to the IS department and provide a list of members who are willing to help as tutors for IS classes

- Coordinate a lunch gathering for members and potential members in a popular cafeteria or other eating location on campus
- Invite potential members to participate with the Student Chapter for a community service event.
- Invite potential members to participate with the Student Chapter for a professional development or career program
- Invite potential members to gather with Student Chapter members to watch a sporting event, either live or on TV
- Coordinate a sports-related event in the campus recreation center, where teams are comprised of both members and potential members
- Meet potential members in a game room on campus to play popular video games
- Host a cookout in a visible location on campus and invite potential members
- Host a luncheon or reception for IS faculty and invite potential members
- Sponsor a scholarship for a student in the IS department and use the list of applicants as an invitation list for the next recruitment event
- Host a careers in IS program and specifically invite students who might be in a related academic program; invite alumni of the chapter who can talk about how their involvement helped them begin their careers

For many of these activities, it can be very helpful for the Student Chapter to have a supply of promotional materials to give to guests/attendees, including informational brochures about the Student Chapter and/or the IS department/academic major as well as give-away such as pens, highlighters, post-it notes, magnets, etc.

Other Resources for Recruitment

The student activities office on your campus should have some helpful resources for you and/or the Student Chapter, from training programs for chapter officers and advisors, to help with navigating campus policies related to planning events, to presenting skill development or goal setting workshops for the Student Chapter. As Faculty Advisor, you should model the way in terms of maintaining a good relationship with this office.

Visit these sites to gather more information about recruitment for student organizations:

- [Membership Recruitment Made Easy](#) – Phired Up Productions
- [You Can't Recruit Who You Don't Know](#) – Phired Up Productions
- http://www.tke.org/member_resources/recruitment/recruitment_guide - Tau Kappa Epsilon Fraternity
- <http://membershipmarketing.blogspot.com/2011/11/five-steps-to-building-membership.html> - ASAE
- http://en.wikibooks.org/wiki/Effective_Student_Organization/Recruiting_and_Membership
- <http://blog.prssa.org/index.php/2011/07/12/recruitment-strategies/> - Public Relations Student Society of America
- <http://webb.nmu.edu/Centers/StudentEnrichment/Organizations/SiteSections/Organization/ResourceMaterials/Recruitment.shtml> - Northern Michigan University

- http://cfli.wisc.edu/handbook/08-09/member_recruit.html - University of Wisconsin-Madison
- http://usu.csun.edu/toolbox/pdfs/rec_ret_members.pdf - California State University-Northridge

Working with the College/University

The AIS Student Chapter exists as a part of the larger campus community. As Faculty Advisor, it is important for you to help the Student Chapter officers maintain an awareness of the college/university procedures related to student organizations; build positive relationships with other student organizations, college/university administrators, and faculty from various departments; and take advantage of various resources provided by the college/university.

As you work with the Student Chapter officers to do this, there are five areas upon which to focus your efforts:

- The host academic department
- The student governing body and the larger campus community
- The student activities office and other campus departments
- Understanding college/university policies and procedures
- Campus resources for student organizations

Understanding this larger campus context and maximizing the resources available will positively impact the Student Chapter's success.

The Host Academic Department

The connection between the Student Chapter and the host department is crucial for several reasons.

- The Student Chapter Faculty Advisor must be an AIS member, and most such persons will be found within the department.
- Most potential Student Chapter members will be found in courses and programs administered by the host department.
- The greatest professional development and networking opportunities for Student Chapter members exist within the department and opportunities to interact with faculty.
- The department might be a potential source of funding for Student Chapter initiatives.
- Faculty members within the host department are potential guest speakers, may serve as liaisons to service opportunities, and provide a connection to the corporate world.
- Student Chapter members can help promote the host department and the IS major both within the college/university and among potential students.
- Student Chapter members can serve as mentors or tutors to others within the IS major.

It is important to create awareness within the host department of the purpose of the Student Chapter and the co-curricular opportunities it provides. Some possible ways for doing so are listed below.

- Provide updates about the Student Chapter during faculty meetings or in newsletters
- Secure a bulletin board or posting area dedicated to AIS Student Chapter information within the host department office or the academic building where most IS courses are held
- Provide a link to the Student Chapter website on the departmental website
- Discuss the Student Chapter during informal conversations with your colleagues
- Designate a visible spot for AIS and Student Chapter information in your office
- Encourage Student Chapter members to talk with their professors or academic advisors about how they are benefitting from their involvement
- Hold a reception for departmental faculty
- Help Student Chapter members get involved in assisting with admissions activities, as mentors to new students, or as tutors to fellow students
- Ensure that the administrative staff in the host department has current information about Student Chapter meetings and programs, as well as contact information for the Student Chapter President and Faculty Advisor.

The possible benefits of implementing these ideas are many.

- The more Student Chapter members connect with faculty, the more willing faculty might be to volunteer their time to assist with programs or even take on the Faculty Advisor role.
- Faculty members who are aware of the Student Chapter might be more likely to encourage students from their classes to join and might become interested in joining AIS themselves.
- Informed faculty might be willing to post information about upcoming Student Chapter meetings or programs in their classrooms.
- The interaction between Student Chapter members and their professors provides opportunities for the faculty to learn first-hand about the positive impact of involvement on the members' learning and professional development.
- Student Chapter members will make a stronger connection to the department and might be more likely to refer others to the college/university and the IS program.

The Student Governing Body and the Larger Campus Community

Two additional connections the Faculty Advisor should assist the Student Chapter to build are the connections with the appropriate student governing entity within the college/university and the larger campus community, including other academic departments and student organizations.

In relation to the student governing body, the following are important questions for which you and the Student Chapter officers should know the answers.

- Is the student governing body housed within the school/college (School of Business, for example) or within the larger college/university?
- Does the Student Chapter receive official recognition as a student organization through the student governing body?
- Does the Student Chapter have a representative seat within this governing body?

- Do the Student Chapter members understand the importance of being a part of the larger student organization fabric on campus?

A positive presence and consistent involvement with the relevant student governing body, with other student organizations, and with various departments on campus can yield many benefits to the Student Chapter.

- Building relationships with other campus organizations could lead to opportunities for collaborative programming, fundraising, or service projects.
- Student Chapter members might meet prospective members through interactions with other student organizations.
- The Student Chapter may be able to provide IS-related assistance to other campus organizations or departments, and thereby build good will for the organization and a greater awareness of the IS field.
- Involvement in the student governing body will ensure that the Student Chapter stays abreast of any relevant policies or procedures related to campus organizations (ex. advertising or space reservation policies) or issues impacting student life. It may also provide access to opportunities for funding from the governing body or the college/university.
- Staff members from campus departments such as the Career Center and the Counseling Center can provide presentations at Student Chapter meetings or programs. In return, the Student Chapter can play a role in helping members understand the benefits and services provided by these campus departments.

The Student Activities Office and Other Campus Departments

On most campuses, there is a department or office through which the college/university provides services for student organizations. No matter the name of this office or department, it is a place with which you and the Student Chapter officers should be very familiar in order to best support the Student Chapter. Familiarize yourself with the services provided, which could include the following.

- Officer and advisor training
- Guidance related to planning on-campus events
- Audio-visual supplies
- Promotional opportunities (listings in student handbook or on college/university website, student activity fairs, etc.)
- Office space on campus
- Attend any meetings or workshops for student organization advisors that are sponsored by this office.
- Ensure that the Student Chapter completes any required process related to registering with this office (if this is required) and/or provides current contact information for you and the Student Chapter President.

There are several other campus departments with which you and the Student Chapter officers should be familiar, including the following.

Event scheduling office

- There may be one office for all on-campus events, or there may be separate offices in different buildings.
- Staff can assist with rooms for chapter meetings, professional development programs, or membership recruitment events.

Student union

- This office may oversee student organization mailboxes, office space, or event registration.

Audio-visual or facilities services

- This may be a separate department, or it may be part of the event scheduling office or student union.

Catering/dining services

- Staff may provide assistance with refreshments for chapter meetings or other programs.

Bursar or financial services office

- This office may be especially relevant if the Student Chapter has a college/university bank account.

Service programming office

Career services office

- Staff may serve as guest speakers at meetings or professional development programs.

Understanding College/University Policies and Procedures

It is important for the Faculty Advisor and Student Chapter officers to be familiar with the following types of policies and procedures related to student organizations.

1. Student Organization Recognition
 - What are the policies related to student organization recognition on the campus?
 - What office or entity oversees student organization recognition?
 - Are there any requirements for gaining or maintaining recognized student organization status? (membership, advisors, officer rosters, attending annual informational meeting, etc.)
2. Student Organization Finances
 - Does the college/university or other official entity require student organizations to maintain an account with the institution?

- Is the Student Chapter eligible to apply for or receive funding through the college/university, Student Activities Office, or student governing body? If so what are the related procedures?
 - Does the college/university or other official entity have any policies related to fundraising?
3. Meetings and Events
- What are the policies and procedures for reserving space on campus? Are there different procedures related to different buildings?
 - Does the campus or other official entity have requirements related to registering events?
 - What are the procedures for arranging audio-visual equipment or catering for Student Chapter meetings or programs?
4. Marketing and Promotional Activities
- What are the policies related to advertising on campus? (flyers, posters, information tables, sidewalk chalk, etc.)
 - Does the college/university, the Student Activities Office, or the host department provide student organizations the opportunity to host a web page on their official site? If so, what are the related policies and procedures?
 - What are the procedures for advertising in the campus newspaper or other student publication?
 - Does the student governing body or Student Activities Office provide opportunities for student organizations to promote themselves? (student activity fair at the beginning of the semester, listing of organizations in the student handbook or other publications, etc.)
5. Other
- Does the campus or other official entity require student organization officers or advisors to attend specific meetings or training seminars?

The college/university student handbook or similar document is likely to be a source for much of this information. A meeting with a staff member from the Student Activities Office would also be a great way to learn more about any policies or procedures for student organizations.

Campus Resources for Student Organizations

There are many resources available to the Student Chapter through the college/university. As Faculty Advisor, you play an important role in assisting the Student Chapter to take advantage of these resources as they work to achieve their goals for membership, scholarship, programming, and service.

Take time to explore the following possible resources.

1. Student Activities Office
 - Administrative support such as the use of a copier, fax machine, scanner, paint, markers, banner paper, etc.
 - Information about policies and procedures related to student organizations

- Guidance on membership recruitment, meeting management, event planning , and much more
- Potential speakers for meetings or programs
- 2. Career Services Office
 - Information about internships and job fairs for Student Chapter members
 - Potential speakers or programs for chapter members (info about their services, career assessments)
- 3. Community Outreach/Service Programs Office
 - Advice on planning and implementing service projects
 - Links to various service agencies within the community that might be looking for help
- 4. Human Resources Department
 - Potential facilitators for chapter/organizational development workshops

Student Chapter Development

For additional student chapter development information, visit the sc.aisnet.org