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*University of Texas El Paso*

# **Certified Advisor Training**

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### **I. The Big Question #1!?** Should we even have clubs and organizations right now?

\_\_\_\_\_!!!

- Clubs and organizations provide \_\_\_\_\_ for students.
- Students that are active are more likely to be \_\_\_\_\_ to the college.
- Retention statistics show engaged students are \_\_\_\_\_ students.
- The members you work with need to work, engage, and connect with \_\_\_\_\_ in order to remain motivated and dedicated in this virtual world.

### **II. Advisor Roles and Responsibilities**

- A.** Be knowledgeable about \_\_\_\_\_ policies, procedures, guidelines, regulations, and procedures.
- B.** Attend meetings and events but \_\_\_\_\_ run them.
- C.** Give ideas and \_\_\_\_\_ about programs, projects, and the direction of the organization. Teach them how to program effectively.
- D.** Allow the students to \_\_\_\_\_ mistakes.
- E.** Ensure students are prioritizing \_\_\_\_\_.
- F.** Manage the \_\_\_\_\_ Board.
- G.** Encourage all \_\_\_\_\_ to be involved and engaged.
- H.** Be a \_\_\_\_\_!
- I.** You are the \_\_\_\_\_ for the club/organization.
  1. Maintain all \_\_\_\_\_ (minutes, budgets, by-laws, etc)

2. Keep a \_\_\_\_\_ of important contacts and connections.
3. Store \_\_\_\_\_, such as banner and gavel, and awards

### III. Membership Recruitment

#### A. Conducting a Successful Virtual Recruitment Session

1. Know the \_\_\_\_\_ and \_\_\_\_\_.
2. \_\_\_\_\_ your club (slides, chat links, social media)
3. Wear proper \_\_\_\_\_ (t-shirts)
4. Use a virtual \_\_\_\_\_ to display a logo, picture of members, etc. Anything that shows who you are!
5. Several \_\_\_\_\_ should participate.
6. Have a defining \_\_\_\_\_ statement or question: What is the organization all about, rather than just the name. Some names do not really tell the whole story.

#### B. Elements of a Successful Virtual Recruitment Session

1. Make it fun! Have \_\_\_\_\_, balloons, \_\_\_\_\_, even use \_\_\_\_\_ and reactions in Zoom.
2. Sign-up information:
  - a. Student name
  - b. Class Status
  - c. Phone number
  - d. Email address
  - e. Areas of interest
3. Create an informational \_\_\_\_\_. Have a \_\_\_\_\_ to post in the chat. Send it later during follow-up. It should contain the following:
  - a. Description of the organization
  - b. List of activities, programs, and ways to be involved.
  - c. List of typical members

- d. List of contacts within the organization (including the advisor)
  - e. Website/social media addresses
  - f. Meeting day, time, and place/platform
4. Display \_\_\_\_\_ or \_\_\_\_\_.

**C. Follow-up on the Virtual Recruitment Session**

- 1. Everyone who signed up should receive a \_\_\_\_\_ that same night with your \_\_\_\_\_ attached.
- 2. Invite them to an \_\_\_\_\_ meeting.
- 3. Before information meeting, \_\_\_\_\_ to remind of meeting date, time, place, and to \_\_\_\_\_ them to attend

**D. The Virtual Informational Meeting**

Campus organizations that show a real interest in obtaining a student's \_\_\_\_\_ are better poised to get them as a \_\_\_\_\_.

- 1. Have dedicated people handle the \_\_\_\_\_ aspects.
- 2. \_\_\_\_\_ all attendees as they \_\_\_\_\_ the meeting.
- 3. Pair them with a \_\_\_\_\_ member(s), perhaps use a \_\_\_\_\_ room.
- 4. All \_\_\_\_\_, advisors, and members introduce themselves.
- 5. Have an \_\_\_\_\_ - \_\_\_\_\_ to get people mingling, virtually.
- 6. Get \_\_\_\_\_ and background information through an \_\_\_\_\_ or similar format. (All sources of contact: home phone, cell phone, all email addresses, school mailing address, home mailing address, and social media. Get high school and community activities.)

**E. The Membership Invitation Program**

- 1. Ask faculty (or high school counselors for incoming students) to \_\_\_\_\_ students for certain types of clubs and orgs, or even specific groups like student government
- 2. Send a \_\_\_\_\_ to the student letting them know they have been nominated and invite them to join
- 3. Download a free template at <https://bit.ly/3ovZYXD>

**IV. Membership Retention**

- A. Meetings are \_\_\_\_\_ or \_\_\_\_\_.
- 1. Make the meeting fun and interesting with lots of \_\_\_\_\_.
- 2. A \_\_\_\_\_ welcomes people to the meeting.
- 3. Have \_\_\_\_\_ to give the attendees a chance to meet other people.
- 4. Call the meeting to order on \_\_\_\_\_!
- a. Have \_\_\_\_\_ playing.
- b. \_\_\_\_\_ the meeting and post it so members can access it later if they could not attend live.
- 5. Give members an \_\_\_\_\_ to talk about what is going on with them, \_\_\_\_\_ concerns, and \_\_\_\_\_ how they feel.
- 6. \_\_\_\_\_ report on their activities and items of interest.
- 7. Have the greeter introduce other guests and meeting \_\_\_\_\_.
- 8. \_\_\_\_\_ report on their area of responsibility and upcoming activities.
- 9. Recognize \_\_\_\_\_, big accomplishments, milestones.
- 10. End the meeting on \_\_\_\_\_
  
- B. The organization is not what the student \_\_\_\_\_ it to be.
- 1. Be \_\_\_\_\_ and upfront regarding what the club is about.
- 2. Be clear regarding expectations about \_\_\_\_\_ attendance and how much \_\_\_\_\_ is required!
- 3. Have a varied \_\_\_\_\_ of activities, some of which can include other \_\_\_\_\_ members and friends, such as \_\_\_\_\_ projects.
  
- C. Challenges \_\_\_\_\_ members from being \_\_\_\_\_.
- 1. \_\_\_\_\_ for the student have changed:

- a. \_\_\_\_\_ with work or class schedules.
  - b. Another \_\_\_\_\_ meets at the same time.
  - c. Academic \_\_\_\_\_ may be heavier than expected.
2. Employ:
- a. All available \_\_\_\_\_!
  - b. Have more than \_\_\_\_ meeting per week, at a different time and day, perhaps led by the vice-president.
  - c. Participation in \_\_\_\_\_ and activities even if they cannot make meetings.
3. \_\_\_\_\_ issues
- a. Consider the \_\_\_\_\_ that someone should have to pay to be involved.
  - b. Use an \_\_\_\_\_ for financial commitments.
  - c. Conduct \_\_\_\_\_ - \_\_\_\_\_. (You must clearly state the purpose of the activity and what the money is for.)  
Virtual fundraising ideas: <https://bit.ly/311YZyj>
4. Members miss a lot of \_\_\_\_\_.
- a. \_\_\_\_\_ to let them know they were missed
  - b. Send a \_\_\_\_\_ note
5. Make the club or organization fun to be a part of by making membership in the organization \_\_\_\_\_.
- a. Conduct an induction \_\_\_\_\_.
  - b. Give a \_\_\_\_\_ of membership or a name badge. Give value to membership in the group through \_\_\_\_\_ (scholarships, conventions, networking, etc.)
- D. Officers don't know how to \_\_\_\_\_ their members.
- 1. Identify the \_\_\_\_\_ and what you are trying to accomplish.
  - 2. Determine \_\_\_\_\_ you want to motivate.
  - 3. Find that person's \_\_\_\_\_.

4. \_\_\_\_\_ that person for what you want: Never fear  
\_\_\_\_\_!

E. The 5 “R’s” of Retention”

1. Give them a \_\_\_\_\_.
2. Enforce \_\_\_\_\_.
3. Give out \_\_\_\_\_.
4. Assign them a \_\_\_\_\_.
5. Help build \_\_\_\_\_.

V. **The Big Question #2!?** What is the value of our club/organization to the campus community? [Write ideas in the space below]