

ASSEMBLY



ASSEMBLY

A practical guide to leading student organizations

USING ASSEMBLY

Taking on a student organization means helping people turn decisions into work they can actually finish. You'll be dealing with meetings, plans and handovers alongside everything else in your week. Use Assembly to work with the time, people and campus support you really have.

You might be an officer, committee member, representative, project lead or advisor. The examples include clubs, graduate associations, student government, community colleges and campus volunteer teams. Bring a live task if you have one, or work with a fictional situation before trying it in your own group.

Choose one responsibility

Pick something small enough to move forward during the next month. Read the pages that fit, try your own approach before looking at the example response and ask the person who'll use the result what's still missing. Speak, type, dictate or use another response format you've agreed on.

The organizations, people, dates, budgets and responses in the practice cases are all fictional. Use the tools to prepare and think through a decision. They don't give you campus permission or replace required training.

Use with local guidance

Your constitution, student organization office, advisor, finance procedures, accessibility office, and relevant campus policies determine what is authorized. Where the rule is unclear, record the question and verify it before committing.

Use the editable response fields, or write on the pages provided. If you need more room by hand, copy the prompts onto paper that gives you enough space to explain your answer.

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CONTENTS AND WAYS TO USE THIS GUIDE

Find the topic that matches the work in front of you. Each main section starts with a question and a short preview, then gives you advice, examples and something to try. Go straight to the responsibility you need help with.

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Reading for a real task

Start with an example that fits, try your own approach and compare the reasoning. Keep the tool that helps and adapt it with the person responsible for the real decision. Come back to the explanation when a question or unfamiliar term needs more time.

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YOUR FIRST MONTH

If you're new to the role, the reading order gives you a useful starting point. If a deadline is close, find that responsibility first, then come back to the pages on authority so you know what your group can decide.

A realistic first month

Week one

Find the nearest deadline and verify the role. Complete the authority map in Chapter 1. Ask your advisor or designated campus contact to correct it. Record missing documents as open questions rather than filling gaps from memory.

Week two

Choose one shared output and test the plan in the meeting and commitment records. Give people a chance to accept, change, or decline a task. Check whether someone who missed the meeting can understand the decision from the record.

Week three

Use the commitment and listening tools on a live proposal. Resolve approvals before publicity or spending. Where no decision is ready, produce a clear recommendation or question instead of forcing a yes.

Week four

Review one result and teach another person how to continue. Keep what worked, change one weak step, and record what remains unfinished. Your evidence should show a useful action, not merely completion of reading.

YOUR FIRST MONTH

If your group is in difficulty

If the group is in difficulty, start with safety, urgent obligations and a campus contact you can name. Get the facts straight about a stalled event, missing account access or an incomplete finance record before drawing up a new strategy. Take serious complaints and immediate risks through the established campus response channels. They should not become a peer investigation or a practice activity.

ROLES AND DECISIONS

ROLES

Who can make the decision your group needs?

A request for a better study space sounds straightforward. It may require a room booking, more staff, a change in access, or a budget decision. Your group may control some of those steps and need help with others.

Break the request into the decisions it actually needs. The library example shows how you can prepare a useful recommendation as a student representative without promising the result. Then map the route for a request in your own organization.

Before you start

Keep your constitution or role description nearby if you have it. Before you rely on the map, ask an advisor or campus contact to correct anything you've misunderstood about who can decide.



Photograph: see image credits.

What to work on

- 1** Find the current rule and responsible office
- 2** Prepare a recommendation with honest limits
- 3** Give the requester a clear next step

FIND THE RIGHT DECISION ROUTE

When someone brings your group a problem, ask which decision would help. A better meeting space could mean a booking, an access arrangement, more money or a change to the regular schedule. Separate those actions before deciding what your organization can take on.

Check the role and the campus procedure

Start with your current role and constitution: what can this group or officer decide? Then check the relevant campus procedure: how is that decision implemented? Finally, find the person who can confirm exceptions or uncertainty. An old officer email can explain history, but it should not outrank a current policy. Record the document title, date checked, and contact who confirmed your interpretation.

Use four possible next steps

Act within confirmed authority

You can complete a routine task when the responsibility, resources, and required permissions are clear. Record what you did so another officer can trace it.

Recommend to the decision-maker

You can frame a need, gather proportionate evidence, compare feasible options, and propose a next step without promising the outcome.

FIND THE RIGHT DECISION ROUTE

Request a specific approval

Name the action, amount or obligation, deadline, and person authorized to approve. Approval for an idea does not automatically approve a contract, purchase, photo release, or data-sharing arrangement.

Refer a matter outside your role

Use the appropriate office for safety, discrimination, financial irregularities, welfare, or specialized questions. Share only what the process requires and tell the person what you can realistically do.

Give the requester a next step

A boundary is most useful when paired with a next action. Say, “Our committee can recommend an extension. Library operations decides staffing. I can ask what a trial proposal needs and report back on Friday.” If the contact does not reply, use the published escalation route or your advisor. Do not turn silence into approval.

A campus title is evidence of a role, not universal permission. A president may chair meetings while a separate office holds purchasing authority. Verify the specific action each time the stakes or conditions change.

THE LATE STUDY SPACE REQUEST

Fictional case. The Northbridge Commuter Association wants the library to stay open until 11 pm twice a week. Its representative, Anika, has six messages from students who leave work after 7 pm. The library currently closes at 8 pm. The association constitution lets its committee make recommendations; the library director controls operating hours. Security and staffing costs have not been estimated.

What the facts support

The six messages establish a real concern among those writers. They do not establish how many students would use later hours or whether 11 pm is feasible. Anika can describe the concern and ask about a trial. She cannot announce new hours, tell students that security is arranged, or speak for everyone who commutes.

A useful first reply

“Thanks for explaining the gap between your shift and closing time. Our association can recommend changes, but the library decides its hours. I’ll ask what evidence and staffing checks a short trial would need, then send an update by Friday. Please don’t send private employment or health records; they aren’t needed for this initial question.”

THE LATE STUDY SPACE REQUEST

How Anika prepares

She confirms current hours from the library's official page and asks the liaison whether another late-opening study area already exists. She proposes an optional question about when students need space and which facilities they need. She checks how to distribute it through more than the association's usual chat, without treating the resulting replies as a representative survey.

Her one-page recommendation names the proposed trial, evidence limits, unresolved staffing and security requirements, and the director as decision-maker. It asks for a decision on feasibility, not a guarantee of permanent hours. She records the date of the request and a follow-up contact.

A changed condition

The director says a staffed library trial is not feasible this term but suggests a classroom building with existing evening access. Anika checks whether the space meets the actual need: desks, internet, group work, quiet, accessibility, and safe closing arrangements. She takes that option back to contributors, explains the limitation, and asks whether it would help. A partial answer should be described accurately rather than marketed as the original request being fulfilled.

Anika records the library's decision and checks who can confirm access to the alternative building before presenting it as available. Use the next exercise to practice advocating for a request while verifying who can authorize each part.

BUILD YOUR AUTHORITY MAP

Try the studio access request

Fictional practice. A design student asks you to promise overnight studio access before a project deadline. They attach a private medical letter. Your committee may recommend access changes; facilities approves building access. The disability support office manages individual accommodation requests. Draft a two-sentence response and identify the first authorized next step.

One response to the student

"I can ask facilities about the general access request, but I can't approve overnight entry. The medical letter isn't needed for that request; please use the disability support office's approved route for any individual accommodation, and I'll check how to handle the attachment under our campus procedure."

The response does not diagnose the student's needs, forward the letter to a general committee, or assume deletion is permitted. The next step is to clarify the general access route with facilities while protecting the attachment. If campus rules require particular reporting or record handling, follow those rules.

authority map

Duplicate these prompts for one decision. Keep private case information outside this shared tool. Fill each answer with a source or mark it "unconfirmed."

What is being requested

BUILD YOUR AUTHORITY MAP

What I can decide and where that authority is confirmed

What another person or office needs to decide

What must be approved or confirmed before we act

Who I will contact and what I will ask

When I will give the requester an update

Check the result

Ask a teammate to read the map and identify the decision-maker without your explanation. If they cannot, rewrite it. A useful map also distinguishes a recommendation from approval, gives a dated next step, and avoids exposing personal information.

BUILD YOUR AUTHORITY MAP

Try again

Facilities permits a supervised two-hour extension but needs a named staff supervisor. Revise your map: the new condition is still unresolved, and publicity should wait. Name who will confirm supervision and when the request must be reduced or postponed.

PEOPLE AND SHARED WORK

PEOPLE AND

What has each person agreed to do?

You can leave a meeting feeling ready to go and still have no workable plan. If the next task is waiting on a room confirmation or a speaker's reply, another reminder won't supply the missing information.

Build on the decision route from Chapter 1 by getting specific about the work. The Friday-deadline example gives you a way to renegotiate a late task without blaming a teammate or leaving everything to the most willing volunteer.



Photograph: see image credits.

What to work on

- 1 Describe the finished task before finding its owner
- 2 Make dependencies and limited time visible
- 3 End meetings with a record people can use

PEOPLE AND SHARED WORK

Before you start

Bring an upcoming meeting or shared deadline. Ask someone who missed the meeting to read the record: can they tell what was decided and what they've agreed to do? If not, make the missing detail clearer.

MAKE SHARED WORK POSSIBLE

Before everyone leaves a meeting, check what each person has agreed to do. For a welcome event, name the invitation, room check or registration task instead of asking someone to “help with the event.” Agree who’ll keep the task moving and when they’ll ask for help. Taking a task on doesn’t mean carrying the whole event alone.

Agree the task before finding its owner

Replace “handle recruitment” with “prepare a 150-word accessible invitation, ready for the communications lead to review on Tuesday.” The second version describes an observable result and a review step. Ask the potential owner whether the task and date fit their capacity. Invite changes without requiring a reason about work, disability, immigration status, caring, or personal circumstances.

Show what each task is waiting on

A poster cannot become final before the room and event time are confirmed. An owner who is waiting for those facts may need a different task rather than more reminders. Record the dependency beside the output and name who resolves it. Agree a trigger such as, “If confirmation is missing by noon Monday, we will publish a save-the-date only if the approved process permits it, or move promotion back.”

Give each meeting a decision

Send a short agenda with the question, needed preparation, and intended result. Put information that does not need discussion in an accessible update. During the meeting, clarify whether an item is for information, recommendation, or decision. Use the group’s actual decision rules, including any quorum or notice requirements. Do not substitute a quick chat poll for a required formal process.

MAKE SHARED WORK POSSIBLE

Create more than one way to contribute

Provide material early where possible, explain unfamiliar abbreviations, allow written input, and check the chosen platform and room. A member who cannot attend should know how their input can be considered before the decision. Accessibility is an ongoing part of planning, not something a participant must repeatedly negotiate at the door.

Check the agreements before people leave

Before ending, review the decisions, owners, dates, and unresolved questions in the accessible formats agreed for the meeting. Give each owner time to confirm or correct their commitment. Circulate the concise record through the approved channel. The useful test is whether someone who was absent can identify what changed and what happens next.

THE PROGRAM DUE ON FRIDAY

Fictional case. A campus careers panel needs a final program on Friday. Mateo owns speaker details, Jia owns accessible copy, and Sam owns publication. Mateo missed the Tuesday meeting. Sam offers to “just do everything.” Two speakers have confirmed; the third has not. The room is booked, but the event’s access contact has not been added to the draft.

Start with facts rather than motives

The team knows a meeting was missed and information is incomplete. It does not know that Mateo is careless or disengaged. The coordinator sends a private check-in: “We need the two confirmed biographies and the third speaker’s status to finish the program. Can you send what you have by 6 pm, or hand over the source emails? If that date no longer works, we can reassign a specific part.”

Reduce the pressure on the willing volunteer

Sam can take a defined task, but the coordinator does not accept an unlimited rescue. Sam agrees to contact the third speaker if Mateo cannot. Jia prepares the layout using only confirmed information and checks the access-contact wording with the designated campus office. Publication remains dependent on a complete review.

THE PROGRAM DUE ON FRIDAY

Output	Owner	Due	Dependency
Confirmed speaker facts	Mateo	Tue 6 pm	Access to the inbox
Third speaker follow-up if needed	Sam	Wed noon	Handover from Mateo
Accessible final draft	Jia	Thu noon	Confirmed facts and contact
Approved program published	Sam	Fri noon	Final reviewer approval

When the reply arrives

Mateo can send confirmed details tonight but cannot chase the third speaker. The team keeps him on the part he can finish and asks Sam to take the follow-up. Nobody needs a public explanation of why his availability changed. The shared record notes the revised owner, not a judgment about the person.

The decision at the deadline

If the third speaker has not accepted by the agreed cutoff, the team asks the authorized event lead whether to publish a two-speaker program. It does not label a person “confirmed” because a chair expects them to say yes. A smaller accurate program is a usable result. The review afterward asks whether the original schedule allowed enough time for replies and access arrangements.

RUN THE NEXT USEFUL MEETING

Plan a meeting with limited time

Fictional practice. Your agenda says “social event, membership, money, any other business.” The group has 35 minutes, one uncertain room booking, and three volunteers with only an hour available this week. Rewrite the agenda around one decision and two achievable outputs.

One workable agenda

Use five minutes to confirm the booking status, ten to decide whether to proceed or choose a permitted fallback, ten to agree the minimum event plan, five to allocate two outputs, and five to read back actions. Move routine membership numbers to the written update. Put a financial commitment on the agenda only when the necessary facts and authorized decision-makers are present.

meeting record

The question we need to resolve today

Who needs to take part under our rules

RUN THE NEXT USEFUL MEETING

Information and access arrangements people need beforehand

What we decided and the rule or approval that permits it

What still needs an answer and who will get it

shared commitment

The task and what will count as finished

Who has accepted the task and who will check it

When it is due and what it is waiting on

RUN THE NEXT USEFUL MEETING

When we will flag a delay and what we can do instead

Language for a changed commitment

“I can finish the invitation copy by Tuesday. I can’t also manage registration this week. Could someone else take that part, or could we reduce what the event needs?” This is a usable negotiation because it preserves a specific contribution and makes the gap visible.

Feedback and revision

Check that the plan fits the available time, owners have agreed, and a missing dependency has a response. If your solution relies on one person absorbing everything, revise the scope. Try again with a member contributing only in writing: what must reach them before the decision, and how will the chair include their input?

EVENTS MONEY AND COMMITMENTS

EVENTS MONEY

What would the organization be agreeing to?

An event quote can look affordable until room costs, access arrangements, delivery, or cancellation terms are included. A sponsorship offer can also ask your group to provide something valuable, such as attendee information.

Look at the work plan and the full obligation together. Check the budget alongside the approval route, then try a response for the moment when a deadline puts pressure on you to agree before the facts are ready.

Before you start

Start with the fictional performance budget before checking a live offer. Getting the total right is one part of the decision. Your organization still needs the required approvals before accepting.



Photograph: see image credits.

What to work on

- 1** Compare complete costs and conditions
- 2** Find the authorized purchaser or signer
- 3** Keep a feasible fallback if approval is delayed

CHECK BEFORE YOU COMMIT

Before you accept an offer, write down everything your organization would have to provide. Alongside a fee, there may be a cancellation charge, publicity requirement, use of the university name, access to attendee information or ongoing costs. A short deadline makes this check more important, not less.

Read the offer as a set of obligations

Write the service or item, provider, full cost, payment schedule, what happens if plans change, and everything your group must provide. Include necessary access arrangements in the plan from the start. Distinguish a quote from an approval, an allocation from cash available, and a reimbursement possibility from permission to spend personally.

Find the campus route before signing or buying

Ask who may approve the budget, place the purchase, and sign the agreement. These can be different people. Check local requirements for food, venue use, insurance, performers, travel, alcohol, fundraising, outside sponsorship, and institutional names where relevant. Use the actual procedure rather than assuming an officer title is sufficient.

Compare complete feasible options

A cheaper option is not feasible if it removes a necessary access provision or depends on an unavailable volunteer. Compare purpose, total cost, lead time, required approvals, and risk. Write down what would make you stop, such as an unresolved contract, a missing qualified supervisor, or costs beyond the approved limit. Give the team a smaller option or a postponement route.

CHECK BEFORE YOU COMMIT

Protect information at the decision point

A sponsor's request for attendee emails is a separate data-sharing proposal. Do not treat free refreshments as permission to supply a roster. Ask the relevant campus office about the proposed use, consent, approved systems, and available alternatives. An approved public thank-you may serve the relationship without sharing personal details.

Close the financial loop

After delivery, compare actual spending with the approved plan, confirm outstanding invoices, and store receipts in the approved place. Record commitments that remain after the event. If the facts do not reconcile, ask for help promptly and preserve records; do not silently rewrite a number to make the sheet balance.

The following budget is a teaching example, not a current quote or financial recommendation. The purpose is to practice checking arithmetic and authority together.

A PERFORMANCE OVER BUDGET

Fictional case. The Arts Forum has approval to spend up to \$900 on a campus performance. The event lead receives a quote with a \$450 performance fee. Other necessary costs are \$200 for the room, \$150 for access provision, \$100 for supplies, and a \$100 contingency allocation. The provider asks the student to accept by tomorrow and lists a \$150 cancellation charge after acceptance.

Cost item	Initial plan	Revised plan
Performance fee	\$450	\$400
Room	\$200	\$200
Access provision	\$150	\$150
Supplies	\$100	\$50
Contingency allocation	\$100	\$100
Total	\$1,000	\$900

A PERFORMANCE OVER BUDGET

What must happen before acceptance

The initial total is \$100 above the approved limit. The cancellation charge is an additional condition to disclose, not a reason to pretend the performance costs only \$450. The event lead sends the full plan and terms to the authorized campus approver. They ask the provider whether the fee can be reduced without changing the agreed performance and identify supplies that can be simplified.

In the revised fictional option, the provider agrees to \$400 and supplies fall to \$50. The total is now \$900, including a \$100 contingency allocation. The team keeps the access provision. This arithmetic does not itself authorize the purchase: the revised offer, cancellation terms, and contracting route still need confirmation. Contingency money is not a license to exceed the spending cap.

A holding reply

“Thank you for the revised quote. We are checking the full cost and cancellation terms through our campus approval process. I’m not authorized to accept the agreement. Could you hold the offer until Thursday at noon while the designated approver reviews it?”

If the deadline cannot move

The group should use its authorized decision process to choose a feasible fallback or decline. If organizational approval cannot be completed in time, ask the designated contracting contact what options remain; do not use a personal signature to bypass that process. The organization must not imply that later approval or reimbursement is guaranteed. The handover record should show whether the event is proposed, approved, contracted, paid, or complete.

MAKE THE COMMITMENT VISIBLE

Respond to the café offer

Fictional practice. A café offers \$180 of refreshments if your society shares attendee email addresses. The room hold expires tomorrow. Your treasurer offers to pay personally and get reimbursed. Write your next three actions and a holding reply.

A sequence for the three checks

First, identify who can authorize the sponsorship and data request; do not send the roster. Second, confirm the room deadline and ask for an extension or permitted fallback. Third, check purchasing and reimbursement rules before any personal spending. These checks can run in parallel, but a favorable answer to one does not resolve the others.

A suitable reply is: “We appreciate the offer. We can’t commit attendee information as part of this arrangement. Would you consider an approved public acknowledgment instead? We still need to confirm the campus sponsorship and event requirements before accepting.”

commitment record

The activity and who it is intended to help

The provider and exactly what they will supply

MAKE THE COMMITMENT VISIBLE

The total cost, including required fees and access arrangements

The approved spending limit and where approval is recorded

How payment works and who may purchase or sign

Cancellation terms and other promises we would make

Approvals still needed and the latest time to decide

What we will do if a required condition cannot be met

MAKE THE COMMITMENT VISIBLE

Check the record when the offer changes

Your record is ready when another officer can calculate the same total, locate the approval, and understand what the organization is promising. Keep card details, private donor information, and credentials outside it.

Now the café accepts a public thank-you instead. Remove the email-list proposal, then check what remains: sponsorship approval, permitted logo use, food rules, cost, room confirmation, and the approval of the acknowledgment. Solving the privacy concern has not approved the entire event.

LISTENING AND REPRESENTATION

LISTENING

Whose views can you fairly describe?

A group chat or optional survey can bring a real problem to your attention. Be clear about what it tells you and what it leaves open about other students. That distinction is part of what makes your recommendation trustworthy.

Once you've checked what your organization can promise, check what it can fairly say. Work through the small response set, protect people's private accounts and prepare a message someone can trace back to the evidence.

Before you start

Bring a question you might ask students or a public claim your group is considering. Underline each statement about a group of people. What information actually supports it?



Photograph: see image credits.

What to work on

- 1 Ask a question connected to a real decision
- 2 Notice who the method may miss
- 3 Explain the result and its limits to the right audience

LISTEN AND SPEAK WITH CARE

Be clear about whose views you're describing. Your own experience, a private account, eighteen survey replies and a claim about all students rest on different information. You can raise a concern while staying precise about what you know.

Choose a question people can answer

Begin with the decision and what is still open. Ask, "Which appointment times could you use, and what would prevent you from attending?" rather than "Don't you agree that our hours are terrible?" Explain who will read responses, what can be influenced, how long the process will run, and how people will hear what happened. Do not promise anonymity if the method collects identities or makes people recognizable.

Check who the method misses

An evening meeting may miss working students; a social-media poll may miss people who do not use that platform; a graduate list may miss undergraduates. Use more than one appropriate route when the missing perspective could change the decision. Describe the reach honestly rather than implying that more responses automatically produce a representative sample.

Summarize without exposing people

Keep the method, counts where meaningful, supported themes, disagreements, and limitations. Do not copy private complaints into a public paper because the story is powerful. Obtain the required permission for identifiable quotations or use a nonidentifying summary that genuinely protects the person. Removing a name may be insufficient in a small group.

LISTEN AND SPEAK WITH CARE

Match the message to your role

A committee representative can report evidence and recommend a change within their remit. An organization spokesperson follows its authorization process. A student journalist follows their outlet's independent editorial standards for verification, confidentiality, and publication; campus leadership is not automatically the approver of their copy. A personal view should not be presented as an official organizational position.

Report back with a useful explanation

Explain what was heard, what decision was made, why, and what remains unresolved. If input did not change the outcome, say so and explain the relevant constraint without dismissing the effort people made. Correct an inaccurate summary through the same appropriate channel where it appeared. Keep a link to the approved decision record so future officers do not have to reconstruct the story.

EIGHTEEN REPLIES ARE EIGHTEEN REPLIES

Fictional case. A graduate association sends an optional appointment-hours question to its 120-member mailing list. Eighteen people reply. Eleven request appointments after 5 pm, four prefer mornings, and three describe other needs. The chair writes, “Most graduate students want evening appointments.” No information was collected about nonrespondents.

Rewrite the evidence claim

“Eleven of the eighteen respondents to our association email requested appointments after 5 pm. Four preferred mornings and three described other needs. We do not know whether these replies reflect graduate students outside the association or members who did not respond.” This preserves the useful finding without expanding the claim beyond the evidence.

Explain what a count cannot tell you

Eighteen of 120 list members replied, which is a 15 percent response rate if the list contains 120 eligible members and each response is unique. Eleven of eighteen is about 61 percent of respondents. Neither number establishes the preference of all graduate students. The association should first check the list and duplicates before publishing either calculation.

EIGHTEEN REPLIES ARE EIGHTEEN REPLIES

Make a proportionate next recommendation

The representative asks the service manager whether an existing appointment-use report can clarify demand and whether a short trial is operationally possible. They seek a second route for input, including people who do not use the association list. They do not ask students to disclose medical histories or reasons they cannot attend daytime sessions.

Prepare a committee contribution

“Our small response set suggests that later appointments may help some students. We also heard support for morning options. Could the service check demand through its own approved channels and consider a limited trial rather than replacing daytime appointments now? I can help draft a neutral question for review.”

Handle the private story

One respondent describes a sensitive personal experience and asks the representative not to identify them. The public summary should not include details that would make them recognizable. The representative confirms what may be shared and directs any individual concern to the appropriate service route. The sensitive story is not evidence that the whole population has the same experience.

The appointment request remains worth considering. Its stated limits help the service decide what to investigate next.

TRACE YOUR MESSAGE TO EVIDENCE

Handle a request for a public summary

Fictional practice. A closed group chat contains three complaints about advising and a personal story shared in confidence. A committee chair asks for a public summary tonight. Draft a reply that preserves the useful issue while protecting the contributors.

A reply to the chair

"I do not have permission to publish the private accounts, and these messages do not establish a wider pattern. I can draft a neutral question about advising for tonight and check with contributors what concerns, if any, can be summarized without identifying them."

This reply does not claim that no problem exists. It distinguishes a credible reason to ask a question from permission to publish a story. If a concern requires reporting under campus rules, follow that process rather than treating this general summary as the response.

listening and message record

The decision and what people can still influence

The question and the ways people can respond

TRACE YOUR MESSAGE TO EVIDENCE

Who we heard from and whose views may be missing

Themes and disagreements supported by the responses

What the information cannot tell us and what needs checking

Permission or authority needed to share the message

Who will read the message and the exact claim I can support

How and when we will report back to contributors

TRACE YOUR MESSAGE TO EVIDENCE

Feedback

Ask a partner to underline every claim about a group. Can each be traced to the record? Replace “students say” with the actual response group where appropriate. Check that no detail identifies someone indirectly and that the message distinguishes an approved decision from a proposal.

Try a different role

You are now a reporter for the independent student newspaper. Identify the reporting, corroboration, source-permission, and editorial questions you need to resolve. Do not simply send your draft to a campus officer for approval or assume committee communication rules govern journalism.

IMPROVING HOW YOUR GROUP WORKS

IMPROVING HOW

Which part of a useful idea fits your organization?

You may see a good system at a job, placement, fellowship, or research group. Your student organization may have less time, different tools, and no reason to copy the whole system.

Start with a problem the people using the change actually recognize. The decision-log example shows how to borrow a useful method while leaving restricted records where they belong and avoiding extra administration. Try a small version, then use the result to decide whether to keep it.



Photograph: see image credits.

What to work on

- 1** Explain the problem before proposing a tool
- 2** Respect source permissions and local capacity
- 3** Try a small change with a review point

IMPROVING HOW YOUR GROUP WORKS

Before you start

Choose a problem that keeps coming back, such as a lost decision or a missed cancellation. Set up a small trial that you can keep, change or stop after people have used it.

BRING LEARNING BACK USEFULLY

You might pick up a useful way of working at a job or placement. Before bringing it into your organization, ask which problem it would solve and whether the group wants help with that problem. Adapt the part that fits your team's time, tools and responsibilities.

Name the problem before proposing a system

"At my placement we used a dashboard" describes a tool. "Our officers keep losing the reasons behind decisions" describes a need. Ask whether your team recognizes that need and what it already does. A new method should earn its place by helping people complete work, not by making a volunteer group resemble a workplace.

Explain the conditions that made it work

A workplace practice may depend on paid staff, specialist software, daily meetings, protected data access, or a supervisor who reviews every entry. List the important conditions. Then compare them with the campus group's time, approved tools, access needs, and decision process. A simpler version can retain the benefit while removing unnecessary maintenance.

BRING LEARNING BACK USEFULLY

Transfer learning without transferring restricted material

Create a fresh example or blank structure rather than copying employer records, research participant information, unpublished results, or confidential templates. Check ownership and permission with the responsible supervisor or office when uncertain. A document that you helped create can still contain information you are not allowed to share.

Set a small trial with a review point

Choose one team, one recurring task, and a short period that is long enough to observe actual use. Agree who maintains the trial, how others can contribute, and what would count as useful. Record the current difficulty before trying the change. Measure something proportionate, such as whether an absent officer can find the last decision and next owner without asking the chair.

Review whether the change should stay

At the review, ask what helped, what created extra work, and who could not use the method. Keep, revise, or stop it. A trial that reveals an unnecessary system can still be useful learning. Do not claim broad improvement from a few convenient examples or continue a tool only because you introduced it.

Your explanation of the learning should distinguish observation from participation. “I saw the team use this” is different from “I designed it.” Accurate credit helps others judge the idea and your contribution.

A DECISION LOG THAT STAYS SMALL

Fictional case. During a placement, Noor saw a project team use a detailed tracking platform. Her student association repeatedly reopens decisions because members cannot find the reason behind them. Noor suggests copying the employer’s entire dashboard. The association has eight volunteers, no software budget, and an existing approved shared document.

Extract the useful principle

The problem is loss of decision memory. The principle is to record the decision, its reason, and the next responsibility where everyone authorized can find it. The employer’s workflow, customer records, and software configuration are not necessary to teach that principle.

Agree a smaller trial

Noor creates a fresh blank record in the association’s approved document with four fields: date, decision and reason, next owner, and review trigger. The secretary agrees to maintain it for three meetings. Members can correct the draft record before it becomes the agreed version. Restricted matters stay in their designated system.

Date	Decision and reason	Next owner	Review trigger
Oct 8	Use the existing room for the welcome session; alternative space is not confirmed	Events lead	Revisit only if access or capacity changes
Oct 15	Open two 30-minute welcome slots; volunteers cannot staff three	Membership lead	Review attendance and volunteer load after delivery

A DECISION LOG THAT STAYS SMALL

Test whether it works

Before the trial, two officers needed to ask the chair where the latest decision was recorded. After three meetings, Noor asks those officers to locate the new entries independently. Both can find the decision, but one cannot tell whether the room is formally approved. The group adds a link to approval evidence where relevant instead of adding ten new fields.

Describe the result honestly

“We tested a short decision record across three meetings. Two officers could locate the new entries without asking the chair. We also found that approval status needed a clearer link.” This is evidence of use and one improvement. It is not proof that the whole association is more effective or that the tool caused better event outcomes.

Noor keeps the part of the idea that solves a local problem and changes it after people try it. The next exercise applies the same approach to a scheduling task.

DESIGN A SMALL IMPROVEMENT TRIAL

Adapt a scheduling method

Fictional practice. You helped schedule participants during a research placement. Your club wants the spreadsheet for its mentoring program, but it contains participant names, contact details, and research notes. The club already has an approved registration tool. What can you bring back?

What you can bring back

Explain the scheduling principle using a fresh fictional example: give each appointment one owner, confirm availability, and record whether a reminder has been sent. Do not copy the research sheet or its contents. Ask the club what its approved tool already handles before proposing a change.

If you are unsure whether even a blank template may be shared, ask the responsible supervisor. The club can still learn from a general explanation while the permission question is resolved. The goal is a better scheduling process, not access to the original file.

adaptation note

The problem this group wants to solve

DESIGN A SMALL IMPROVEMENT TRIAL

The idea I saw and what I actually did in that setting

What made the method workable in its original setting

Material or permissions we must check before sharing

The smaller version we will try in our approved tools

Who will maintain the trial and when we will review it

A sign that it helps and an extra demand it could create

DESIGN A SMALL IMPROVEMENT TRIAL

How we will decide whether to keep, change, or stop it

Review and try a changed situation

A good note starts with a real need, does not move restricted information, and includes a review that can produce a no. If your result is “everyone liked it,” identify what they actually did that made work easier.

Now the club says its tool already sends reminders, but volunteers miss cancellations. Revise the trial to address cancellation handoff only. Do not add a second reminder system. Check who receives notices, who updates the schedule, and how a volunteer can find the current version.

TRANSITIONS AND YOUR CONTRIBUTION

TRANSITIONS AND

Could the next person continue without you?

As the term ends, your successor needs more than a folder of old files. Put the next deadline, current status and next action where they can find them. Name the person who can answer whatever is still unresolved.

Gather those details while they're still easy to check. The handover example also shows how good records help you explain your own contribution accurately, without claiming more than the evidence supports.

Before you start

Choose a responsibility you're handing over. Ask the incoming person to find a record and explain the next step. Anything that still depends on your memory needs another line in the handover.



Photograph: see image credits.

What to work on

- 1 Put live obligations and access needs first
- 2 Test the handover with its next user
- 3 Keep an accurate account of your own work

LEAVE A USEFUL AND HONEST RECORD

Start the handover while there's still time for questions. Show your successor what's current, what's unfinished and what they need to do next. Organize the record around those needs so they don't have to reconstruct the term from old messages.

Begin with the next deadline

A renewal due next week matters more than a long account of last year's event. For each live item, record its status, next action, agreed owner, deadline, approval needs, and evidence location. Label "requested," "confirmed," "paid," and "complete" accurately. Include the contact who can resolve uncertainty rather than a vague instruction to ask around.

Transfer access through the authorized route

Give a successor the access their role needs using the institution's approved process. Do not put passwords or recovery codes in a handover document. Keep membership records, complaints, financial details, and other restricted material in their proper systems. Confirm that the successor can open the permitted files; a link in an email is not proof of access.

Run a short demonstration

Ask the incoming person to find the nearest deadline, explain one approval route, and identify the next step on a live task. Let them try before supplying the answer. Their difficulty is information about the handover. Fix the record or arrange the missing introduction while help is available.

LEAVE A USEFUL AND HONEST RECORD

Agree the end of responsibility

Name the transfer date and who owns unfinished work afterward. If there is no successor, ask the advisor or designated office to accept the open items. Do not assume an outgoing volunteer remains responsible indefinitely. A limited period for questions can be helpful when freely agreed and clearly bounded.

Keep a separate contribution record

For applications and interviews, record what you personally did, what the team achieved, and what evidence supports the result. Credit others. Distinguish completion, use, and outcomes. “I prepared a booking calendar that the new committee used” is stronger than an unsupported claim that you transformed engagement. Remove private information before sharing examples outside the organization.

University transition guidance emphasizes deliberate meetings, records, and introductions. Adapt those practices to your own campus rather than importing another institution’s deadlines or requirements. See the resource page for the original sources.

AN INCOMPLETE HANDOVER

Fictional case. The new Horizon Society president receives a folder named “Everything final.” It contains last year’s member list, a poster with an unconfirmed venue, and a note saying, “Attendance doubled because of my campaign.” Recognition renewal is due next Tuesday. The outgoing president is starting exams and can meet for 25 minutes.

Stabilize the immediate work

The incoming president confirms the recognition deadline and required steps with student involvement. They ask the outgoing president to identify outstanding bills, reservations, and commitments. The folder’s name is ignored as evidence of completion. The venue is marked pending until the official confirmation is found.

Use the short meeting well

Five minutes establish urgent obligations. Ten minutes cover the three most important live items and their records. Five minutes test approved access and locate a key file. Five minutes confirm new owners, remaining gaps, and the transfer date. Sensitive records are not copied into a general orientation folder for convenience.

AN INCOMPLETE HANDOVER

Rewrite the exaggerated claim

The team finds that last year held two welcome events with 30 total visits and this year held four with 60 total visits. Total visits doubled, but average visits per event remained 15. The records may count repeat visitors. They do not show unique members or establish that the campaign caused the change.

An accurate contribution statement is: “I coordinated invitation copy and distribution for four welcome events. Records show 60 visits across those events, compared with 30 across two events the previous year. We did not track unique attendees, and other team members managed programming and logistics.”

Leave an actionable open item

“Recognition renewal: due Tuesday. Incoming president owns submission. Advisor must confirm the current officer roster first. Form location is in the campus organization portal. Roster review requested Thursday; check Friday and use the published support route if still unresolved.” This gives the successor enough information to continue without inventing approval.

The corrected record helps the next team continue and gives the outgoing officer an accurate account of their work.

TEST THE HANDOVER

Transfer an event still in progress

Fictional practice. A partner event is three weeks away. One speaker has accepted, a second is considering, and the room request is pending. Your term ends Friday. Write the handover so the incoming team can make its next decision.

A handover the team can use

“Partner event is three weeks away. One speaker has accepted; the second speaker’s response and room approval are pending. Before my term ends Friday, we need to agree who will follow up, by when, and who can authorize the next decision. I will add the exact event date and links to the checked records, then confirm the incoming owner can use them. This handover does not itself approve spending or publicity.”

handover sheet

The responsibility and agreed transfer date

The checked current status and where the record is kept

TEST THE HANDOVER

The next action, the person who accepted it, and the deadline

An approval or question still open and who can resolve it

File or account access to arrange through the approved process

The person who has agreed to take unfinished work

contribution account

What I personally did and when

The work other people contributed

TEST THE HANDOVER

What was completed or used and how I know

What the evidence does not establish

Try it and compare notes

Ask the successor to find one record, describe the next action, and explain what still needs approval. If they cannot, revise the sheet. A successful handover is demonstrated use, not an attachment count. Confirm which records must be retained and which access should change under local procedures.

Replay the case with no named successor. Your next action is to ask the designated advisor or office to accept the open responsibility, not to leave “next year’s team” as the owner. Record any unaccepted item visibly and agree what can safely pause.

BUILDING A MEMBERSHIP THAT CAN PARTICIPATE

BUILDING A MEMBERSHIP

What would make a first contribution possible for someone new?

Getting attention for your group is only the start. Someone looking at a sign-up sheet still needs to know the first task, what taking part costs and how a new member can influence decisions. Make those arrangements visible, then check whether people can actually use them.

Follow the route from first contact to a contribution that matters. Check your invitation, put support around a first task and look carefully at participation figures. Someone stepping away isn't automatically a sign that the group has failed.



Photograph: see image credits.

BUILDING A MEMBERSHIP THAT CAN PARTICIPATE

What to work on

- Explain eligibility and the ordinary work before asking for a commitment.
- Give a newcomer a useful first task with an accepted support arrangement.
- Read attendance figures with a clear denominator and an honest limit.

Choose one way into your organization: an open meeting, a project briefing or a supervised activity. Follow it as someone who doesn't know the officers. Can they work out what happens next and choose a level of involvement that fits their life?

Taking part, being a member and being eligible to vote may mean different things in your rules. Someone can help with an open activity without getting a vote, and a member can keep their rights while choosing not to take an optional task. Check the current constitution and campus requirements before describing those boundaries. These pages cannot authorize equipment use, waive training or change membership rules.

MAKE THE INVITATION ACCURATE

When you invite someone in, help them work out whether your group fits their interests and their week. Say what you actually do, who can join, what taking part involves and how to get started. Your poster can catch someone's attention, but they'll still need answers about hours, fees and whether attending an open event makes them a voting member.

Show what people actually do

Give an example of an ordinary week or activity. A film society might discuss films, prepare screenings and keep an equipment request list. A subject association might run peer discussions and take questions to a department meeting. Be clear about those jobs before promising connections, influence or career benefits your group can't guarantee.

Tennessee Tech's student-organization guidance recommends explaining the group's work, welcoming newcomers, communicating early and making room for people to contribute. Put that into the details of your invitation: where to go or how to access the meeting, whom to ask a question, and what someone coming for the first time will actually be asked to do.

Separate the rules from your group's habits

Check which requirements come from your organization or institution and which ones current members have simply got used to. Required equipment training is different from expecting everyone to stay late after meetings. For voting, eligibility and safety, give the verified rule. Don't quietly add a requirement or relax one because it makes recruitment easier.

MAKE THE INVITATION ACCURATE

Be upfront about known costs before someone commits. Keep optional activities separate from necessary fees. If support is available, check how someone can ask for it privately. Don't promise a waiver you can't grant, and don't ask someone to explain a financial difficulty in the group chat.

Give people a next step they can use

That could be an open session, a short introduction or an accessible activity brief. Say when they'll hear back and make sure someone has agreed to reply. A sign-up form doesn't need every detail you could collect. Ask only for what the approved follow-up needs, explain how you'll use it, and follow campus rules for keeping and removing it.

Read the invitation as someone who doesn't know your abbreviations or your friends. Can they tell what will happen, what to bring and whether joining creates an immediate obligation? Ask a reader to show you what's missing. Fix that information before adding more promotional language.

DESIGN A FIRST CONTRIBUTION WITH SUPPORT

Give a new member a first task that connects to the group's actual purpose. Make the result visible, keep the scope reasonable and name someone they can ask for help. A vague title or an unwanted leftover job can leave them responsible for work without enough information to do it.

Make the task teachable

Describe the result and show an example. Instead of "handle publicity," ask a new member to check a draft event notice against the approved details and flag missing information. Explain which parts they may edit and who authorizes publication. The task offers a real contribution while keeping the final decision with the appropriate person.

Separate the task from the access needed to do it. A new member may need instructions, an accessible file or a supervised introduction before any account access. Do not share another member's password to make onboarding quicker. Use the institution's approved account and training process, and limit access to the assigned responsibility.

Build a check into the task

Agree a short first check before the final deadline. Ask what the person understood, what they have tried and which part is unclear. The experienced member should make time for that conversation rather than treating every question as evidence that the newcomer lacks commitment. A useful explanation names the decision: "Keep the provisional time marked provisional until the room booking is confirmed."

DESIGN A FIRST CONTRIBUTION WITH SUPPORT

If the task is too large, divide it by a meaningful result. One person can compare two venue access descriptions while another checks the approved capacity. Splitting work into small pieces is useful only when someone knows how the pieces will be joined and checked. Record that responsibility too.

Let participation develop

Offer more than one way to contribute when the work allows it. A student who cannot attend a late meeting may still prepare a question brief in advance. An alternative needs a real route into the decision; collecting written comments that no one reads creates extra work without participation.

After the first task, ask what the member would like to understand or try next. Explain how responsibility, voting and officer roles are actually allocated. Do not promise rapid promotion or turn continued membership into an obligation to accept every request. A sustainable arrangement leaves room to reduce a role or leave it with a clear handover.

READ PARTICIPATION WITHOUT INVENTING THE EXPLANATION

Agree what you're counting before using a participation record. An information request shows that someone wants information. An attendance record shows they were at a particular activity. Training completion and voting eligibility each need their own evidence. Calling all of these "membership" hides differences you need for planning and fair decisions.

Keep the unit and period visible

Before calculating a rate, write its numerator, denominator and time period in words. "Nine of the eighteen introduction attendees returned to the next supervised session" identifies the same group at two points. "Nine of forty information requesters attended that next session" answers a different question. Neither statement describes people outside the recorded group. If attendance was counted as visits rather than unique people, say so.

In the fictional repair-society case, 18 divided by 40 is 45 percent. Nine divided by 18 is 50 percent. Nine divided by 40 is 22.5 percent. These calculations describe successive attendance within the stated group; they are not competing estimates of one universal retention rate. Keep the raw counts beside the percentages so a reader can see the scale. Do not add the three counts together as if they represented 67 different people.

Separate an observation from an explanation

A student who does not return may have a timetable conflict, prefer another activity or have encountered an avoidable barrier. The count alone cannot choose among those explanations. A comment about an unclear finish time supports improving that information. It does not establish why every absent person stayed away. Avoid labels such as "uncommitted" when the record contains only absence.

READ PARTICIPATION WITHOUT INVENTING THE EXPLANATION

Use a small amount of optional feedback connected to an action you can change. Ask which part of the instructions needs clarification, or whether the advertised times were accurate. Explain how the answers will be used. People should be able to decline without being pressed for personal circumstances. Small groups may make a comment identifiable even after a name is removed; keep public reporting proportionate.

Choose a useful comparison

Decide before the trial what you will observe. Did the promised introduction happen? Could participants describe an available task? Was the support person present? If the next session attracts more people, record what else changed, including timing and training availability. A one-session comparison can inform the next invitation. It cannot prove that the invitation caused attendance to rise or that the whole membership experience improved.

Bring the findings back to the group as a decision: keep a clear instruction, revise an unavailable option or stop a task that cannot be supported. More attendance is not automatically the best result when there are too few safe training places. An accurate invitation that helps someone decide not to join can still have served that person well.

Forty Names and an Unclear Next Step

Fictional case. The Campus Repair Society receives 40 requests for information at a fair. Eighteen of those students attend an introduction. Nine of the eighteen attend the next supervised session. The group’s public post says “Try practical repair skills,” but the follow-up message lists only a room and time. Training is required before using any equipment. No training places have yet been allocated.

Record	What it shows	What it does not show
40 information requests	People asked for more information	Forty trained members or a commitment to attend
18 introduction attendees	Eighteen of the interested students attended	Why the other twenty-two did not attend
9 returning attendees	Half of the introduction group returned	That the other nine disliked the society

Locate the missing arrangement

At the second session, new attendees wait while experienced members work. Three newcomers ask what they are allowed to do. Two others say the finish time was missing from the message. These comments support checking the task and timing information. They do not establish the reasons for every absence.

The committee proposes a revised invitation that states the session length, equipment boundary and available non-equipment tasks. A trained supervisor must confirm which tasks are suitable and how future training places will be offered. Until that check is complete, the group cannot advertise guaranteed equipment practice.

FORTY NAMES AND AN UNCLEAR NEXT STEP

Make a limited trial

For one session, the committee offers a supported task: review the clarity of an approved repair-intake form using fictional items. One experienced member accepts responsibility for the introduction and questions. This is a contribution to the society's work, not a substitute for the required practical training.

Afterward, participants may answer two short questions about whether the task was clear and whether the timing information was accurate. The committee also records whether the introduction actually took place. It avoids publishing names or interpreting silence as a negative review.

Practice a revision

Write the next invitation in no more than a short paragraph. Include the useful work, the training boundary and the next step. Then explain what you would measure during the trial and what conclusion the result could not support. If the supervisor cannot attend, revise or postpone the activity rather than asking an untrained member to supervise.

Invitation draft

What the trial can and cannot show

FORTY NAMES AND AN UNCLEAR NEXT STEP

Compare your reasoning

A draft for release after the supervisor confirms the task and arrangements could read: “Join the Campus Repair Society at [confirmed place] from [start] to [finish]. New attendees can help check the clarity of an approved repair-intake form using fictional items, with an experienced member available for questions. Equipment use requires training; this session does not provide or replace it. Contact [approved route] for the introduction details and information about future training places.” Replace every bracketed field with verified information before publishing.

The draft is deliberately conditional because the case supplies no date, venue confirmation or allocated training place. A model answer that invents those facts may look more finished while being less usable. If the support arrangement fails, revise the offer before sending it; do not advertise a supported activity and hope someone steps in.

For the trial, keep a brief record of whether the introduction occurred and whether the advertised task was available. Summarize optional clarity and timing feedback without identifying people. A reasonable conclusion might concern a missing instruction that the group can repair. The trial would not establish why all non-attendees stayed away, authorize equipment use or make every attendee a voting member.

MAP THE ROUTE INTO PARTICIPATION

Start with one kind of contribution in a real authorized activity, or use the fictional repair-society situation. Use the record to make joining clearer while leaving personal histories out of it.

The organization's purpose and the specific contribution available

The verified eligibility, training, cost and time requirements

What the first invitation needs to explain

The first task, its useful result and the boundary on authority

The person who accepted the support role and the first check

MAP THE ROUTE INTO PARTICIPATION

An alternative participation route and how it reaches the work

The observation or optional feedback that will help us improve the process

Review the route

Ask someone unfamiliar with the activity to follow the instructions. Note where they need an explanation. Check whether the proposed support person has agreed and whether an advertised alternative is actually available. Revise those arrangements before making the invitation public.

Make one revision after use

Give the invitation and task instructions to a partner without explaining them aloud. Ask the partner to identify the first action, what is optional and where a decision or training boundary remains. Record the first point where the instructions fail. Revise that point and repeat the test. If you are using a live activity, resolve the relevant local approval before putting the revised invitation into use.

The instruction or arrangement I changed and the evidence for that change

MAP THE ROUTE INTO PARTICIPATION

The local question still open and the person who will verify it

OPTIONAL SUPPORT FOR REVIEWING HOW PEOPLE JOIN

Optional notes if you're helping a small group review how people join. Allow about 40 minutes and bring the fictional case and blank prompts. If you're looking at a real organization, bring the current local eligibility or training information too. Offer spoken, typed or dictated responses. People can take part without explaining why they left a group or missed an event.

Try a first version

Give everyone the first five minutes to write a two-sentence invitation and one sentence explaining the three counts. Keep those versions to compare later. Spend the next eight minutes separating an information request, attendance, training and a vote. Ask which fact supports each claim rather than choosing the answer that sounds most confident.

Test the route

Give pairs twelve minutes to complete the participation record. One person acts as a newcomer who has only the written instructions. The other reads the proposed task and identifies what support has actually been agreed. Switch roles, then introduce a changed condition: the trained supervisor is unavailable. Ask each pair to revise the activity and invitation without appointing an untrained replacement or assuming a different task is automatically approved.

OPTIONAL SUPPORT FOR REVIEWING HOW PEOPLE JOIN

Give feedback that changes the work

Use ten minutes to look at the revised invitation and record with the feedback questions below. Pick a sentence to keep and a specific change to make. For example: "Your invitation states the finish time. It still promises equipment practice although no training places are allocated. Replace that promise with the confirmed non-equipment contribution and a checked route for training information."

- Accuracy: the invitation distinguishes actual activities, optional choices and verified requirements. Revise if a benefit, cost waiver or training place is promised without support.
- Usability: a newcomer can find the next step, time commitment and contact. Revise if the route depends on unexplained abbreviations or knowing an officer personally.
- Support: a named role has accepted the introduction and check. Revise if supervision, file access or a task is assumed rather than arranged.
- Interpretation: counts have a clear denominator and remain separate from explanations of absence. Revise if visits become unique members or participation becomes voting eligibility.
- Care: feedback is optional and proportionate. Revise if the task requests private histories, exposes an identifiable criticism or pressures someone to explain a reduced commitment.

Leave with a next step you can take

Use the final five minutes to compare the first and revised versions. What changed in the work, and what still needs a local check? Better wording or a corrected calculation shows improvement in this task. It does not validate the feedback criteria or establish long-term retention effects. For a live group, finish with an accepted task and a review date. A draft by itself doesn't confirm that the support will happen.

FAIR ELECTIONS AND DEFENSIBLE GROUP DECISIONS

FAIR ELECTIONS AND

Could a member understand how the group reached its decision?

A close election puts the rules under pressure. Who was eligible? Was the meeting properly announced? Which votes count toward the result? Settle those questions before the tally is known, rather than changing the contest while it's under way.

Treat the procedure as work to prepare, explain and record. Read the rules, plan the election and think through what you'd do with a tie that the rules don't cover. The same habits help with other decisions, but a budget motion, constitutional amendment and officer election may each follow different rules.



Photograph: see image credits.

FAIR ELECTIONS AND DEFENSIBLE GROUP DECISIONS

What to work on

- Distinguish eligibility, notice, quorum and the threshold for a decision.
- Arrange a process members can use before nominations or voting begin.
- Record an unresolved result and locate the authorized route for clarification.

Before you start

Find the current approved constitution, any election procedures that apply and the relevant campus guidance. Check their dates and whether they cover this decision. Another university's example can help you spot questions to ask, but it cannot supply your group's voting rule. Use the fictional case if you can't confirm your local documents.

READ THE RULES AS A DECISION SYSTEM

Read the rules together, in the order you'll need them. Your constitution may define who can vote in one place and describe elections somewhere else. A separate campus procedure may control the voting platform or approval of constitutional changes. Keep those sources together, check the applicable version and ask the designated campus contact about any conflict.

Identify the decision and its eligible participants

Write the exact decision first: elect a treasurer, approve an activity or amend a constitution. Then find who may propose it, stand for office, take part in discussion and vote. These permissions need not be identical. Attendance at an open event, inclusion on a mailing list or willingness to volunteer does not automatically establish voting eligibility. Check the required record through the approved route without exposing unnecessary member information.

Distinguish a valid meeting from a successful proposal

Quorum is the required level of participation for specified business to proceed under the applicable rules. The voting threshold states what result is needed for a decision. Meeting a quorum does not mean a particular candidate has won. Likewise, many favorable votes cannot repair an unmet notice requirement by themselves. Check which conditions apply and how the rule defines the relevant group.

The words “a majority” are incomplete without a denominator. A majority of valid candidate votes, members present and all eligible members can require different totals. For arithmetic practice only, a majority of 16 votes requires more than eight; a majority of 18 people requires more than nine. Neither example establishes the threshold in your organization. Do not quietly choose the smaller denominator when a result is close.

READ THE RULES AS A DECISION SYSTEM

Look for the cases the rule must handle

Check the treatment of abstentions, invalid ballots, an uncontested position, a tie, a vacancy and a disputed eligibility decision. Find who interprets an ambiguity and how an objection may be raised. Do not assume the chair has a casting vote, an advisor can appoint the winner or the group can change a rule through a show of hands. The authority to chair a meeting is not a general power to fill gaps.

Penn State's 2022 constitution template separates membership, officers, elections, operating procedures and amendments, with instructions and examples for organizations to adapt. It illustrates why these questions belong in a written system. Its example choices and University Park requirements must not be treated as current policy for another institution. Use your own approved documents for the actual decision. Source: Penn State RSO Constitution Template, linked in this chapter's sources.

PLAN THE PROCESS BEFORE THE CONTEST

Plan the process before you know who might win. Work back from the required decision date through notice, nominations, eligibility checks, candidate information, voting and review. Use the actual notice period, rather than the date that best suits the current committee. Name who can handle a question if the organizer is unavailable.

Give everyone the same usable information

An election notice should name the position and duties, eligibility criteria, nomination route, deadlines, voting method and source of the rules. Explain how participants can request access support through the appropriate channel. If an approved online process is used, test its instructions and accessible operation before opening the real vote. Do not switch to an informal chat poll merely because it is easier to run.

Use consistent opportunities for candidates to describe their approach. Explain the format and length in advance, apply the same published arrangements and correct an administrative error transparently. If one candidate receives a substantive answer about the process, consider whether the answer needs to reach everyone through the official channel. Keep individual eligibility records out of that general update.

Separate administration from campaigning

Find who is authorized to administer the election, verify the eligible list, count votes and review challenges. Identify conflicts early and use the applicable alternative route where an officer is also a candidate. Fair administration depends on the assigned role and safeguards, not an assumption that a familiar person will be impartial. A workshop cannot appoint an election official for a live organization.

PLAN THE PROCESS BEFORE THE CONTEST

Plan the record and the exception route

Agree how the process will establish that each eligible person has the permitted opportunity to vote while protecting ballot confidentiality where required. Follow the approved retention and access rules. Do not promise anonymity merely because names are absent from the public tally; the voting system may retain identifiable information.

Before voting opens, identify where a voter can report an access failure or a candidate can question the procedure. If an ambiguity would affect the result, seek clarification before proceeding wherever possible. Preserve the question and response in an appropriate record. A deadline creates a need for a prompt authorized decision; it does not give the organizing team new powers.

FROM DISCUSSION TO AN ACCOUNTABLE RESULT

At a meeting, tell people whether an item is for discussion, a recommendation or a formal decision. State the proposal clearly and make the relevant wording available in the agreed accessible format. Check the conditions that apply before calling a vote. If the discussion changes the proposal materially, check the rules again before voting on the revised version.

Let the record show what actually happened

Record the decision under consideration, the applicable rule, the quorum check and the tally in the categories the procedure requires. Separate valid votes, abstentions and invalid ballots rather than hiding them in one total. Report the result under the stated threshold only when that interpretation is supported. A record should let an authorized reader follow the reasoning without disclosing how an individual voted.

Suppose a teaching exercise states a quorum of fifteen eligible members present and eighteen attend. The starting attendance satisfies that condition. If people leave before a decision, the earlier headcount may no longer settle the question. Check the actual rule and current participation. Do not infer a continuing quorum from the number of names on the sign-in sheet.

Handle uncertainty without manufacturing a result

When the rule is missing or contested, describe the unresolved point precisely. “We have a tie and have not located an applicable tie procedure” is more useful than “The constitution is bad.” Secure the appropriate record, follow any existing dispute or interpretation process, and seek help from the designated campus contact. If that contact advises the group, verify who still has authority to make the procedural decision.

FROM DISCUSSION TO AN ACCOUNTABLE RESULT

Do not announce a winner merely to finish the meeting. Equally, do not promise an automatic rerun or runoff unless the governing process permits it. Record what remains unresolved, who has accepted the verification task and when members will receive a status update. Separate that status message from a decision that has not yet been authorized.

Close the loop after clarification

Once the authorized route establishes the next step, tell participants what will happen, its basis and any required notice or access arrangements. Correct an inaccurate announcement through the appropriate channel. Later, the organization can consider a prospective rule change using its amendment procedure so the same gap does not surprise the next committee. Record the current outcome and future improvement as separate items.

A TIED VOTE WITH AN INCOMPLETE RULE

Fictional case. An organization has 30 eligible voting members. Its stated quorum in this situation is 15 eligible members present, and 18 eligible members attend the election meeting. There are 16 valid candidate votes: eight for each of two candidates. Two members abstain. The supplied rules do not explain what happens in a tie, and no source has been found authorizing a casting vote. One officer says, “The chair should just choose so we can move on.”

Start with what the record establishes

The eighteen eligible attendees meet the stipulated quorum of fifteen. Each candidate receives eight of sixteen valid candidate votes, or 50 percent. The two abstentions remain a separate part of the record. They are not two additional votes for either candidate. Quorum and the candidate tally answer different questions.

No winner can be established from the supplied information. The case does not give the chair authority to break the tie, and the absence of a tie rule does not itself create that authority. If the applicable election threshold were a majority of valid candidate votes, eight would not exceed half of sixteen; that conditional arithmetic still would not supply the missing next procedure.

A defensible announcement

A TIED VOTE WITH AN INCOMPLETE RULE

“Eighteen eligible members attended, meeting the stated quorum of fifteen. The valid candidate votes are tied at eight each, with two abstentions. We have not located an applicable tie procedure and are not announcing a winner. We will use the designated interpretation route, preserve the election record under the approved process and give members a status update by [agreed time].” The chair must confirm the actual contact and update time rather than leaving those details implicit.

Choose the next action within authority

The organizer checks the complete current rules and any incorporated election procedure, then puts the specific gap to the designated campus contact. The question is which authorized process applies, including any requirements for notice, consultation or review. Asking for guidance is not permission to discard ballots, give an extra vote or appoint a candidate. Any temporary coverage of urgent duties also needs its own authority.

Practice a changed condition

A candidate now says the invitation omitted an eligible member. Write a response that records the claim without declaring it true or dismissing it. Identify the records an authorized reviewer would need and the appropriate challenge route. Do not publish a member list or inspect private messages beyond your role. Explain how this new issue may affect the next procedural step even though it does not change the arithmetic already recorded.

The result the supplied facts establish and the result they do not establish

A TIED VOTE WITH AN INCOMPLETE RULE

The exact procedural question and the authorized person or route to consult

The status message and the agreed next update

PREPARE A DECISION PROCESS CHECK

Use this check for the fictional election or a real decision you're authorized to prepare. Add document titles, current versions and specific clauses where you can. Mark missing evidence as "unconfirmed." A practice you remember from another group is something to check, not a rule to fill the gap.

The exact decision and the body authorized to make it

The current governing documents and where the applicable provisions are found

Who may propose, stand, participate in discussion and vote

The notice, nomination and access arrangements that must be met

The quorum and how it will be checked at the relevant time

PREPARE A DECISION PROCESS CHECK

The decision threshold, its denominator and treatment of abstentions or invalid ballots

Who has accepted administration and review roles and how conflicts are handled

The approved voting method and the record retention and access arrangements

The route for a tie, ambiguity, eligibility question or challenge

The unresolved question, who will verify it and what must wait

PREPARE A DECISION PROCESS CHECK

Test the check with another reader

Ask a partner to calculate the result from your rule and fictional tally. Then ask them to find the source supporting the calculation. A correct number without an applicable rule is insufficient. If partners disagree, identify whether the difference is arithmetic, wording, version or authority before trying to resolve it.

Try a second decision

The same organization now proposes changing its constitution. Copy the blank prompts and complete a separate check. Do not carry the election's notice, quorum or voting threshold across automatically. Explain which facts remain useful and which rules must be verified anew. This transfer task reveals whether you learned a method of checking authority or only memorized the election example.

OPTIONAL SUPPORT FOR ELECTION DECISIONS

Optional notes for working through an election decision together. Allow 45 minutes and give everyone the fictional facts and a blank decision-process check. If you add a practice rule, label it as an extra fictional assumption and share it with everyone. Your preferred parliamentary practice cannot supply a missing local requirement.

Start with your own answer

Spend five minutes having each person write the tally, check quorum and suggest a next step. Use the next ten minutes to compare answers. Ask, “Where did the power to break the tie come from?” and “Which denominator does your calculation use?” Give anyone using an unsupported rule a chance to revise it. Speed and confident vocabulary don’t settle the procedure.

Practice the unresolved announcement

In pairs, allow ten minutes for one participant to deliver a short status message while the other plays a member asking why the chair cannot decide. The response should explain the actual uncertainty, name a verification route and give an agreed update point. Switch roles. Participants may write the exchange instead of performing it.

Introduce an objection

For the next ten minutes, add a report that an eligible member was not notified. Ask pairs to update their record and next step. Keep a reported concern separate from an established finding and preserve the proper review route. Keep the situation fictional rather than asking the group to decide someone’s real election dispute.

OPTIONAL SUPPORT FOR ELECTION DECISIONS

What changed in the work

- Rule accuracy: sources and applicable versions support the process; another institution's template is identified as an example.
- Numerical accuracy: quorum, votes and abstentions remain distinct, with an explicit denominator for each percentage or threshold.
- Procedural restraint: the response does not invent an extra vote, automatic rerun or decision-maker.
- Practical communication: members can identify the unresolved issue, record status and next update without being told an unsupported outcome.
- Fair access and care: the plan considers consistent information, access needs, conflicts and proportionate handling of voter records.

Use the final ten minutes for specific feedback and a second written attempt. A sound answer may leave the winner unresolved. Ask what additional evidence would change the answer. Compare the two attempts using the same criteria to find a useful revision, not to rank leadership potential or claim that the program prevents election disputes.

WORKING ACROSS ORGANIZATIONS

WORKING

What have the partners actually agreed to make together?

Two organizations can agree to work together while picturing different results. One may need accurate service information; another may want a piece members can show in a portfolio. Before you divide up tasks, talk through the audience, deadline, authority and amount of work. A shared project title won't settle those details.

Follow a small collaboration from agreeing its purpose through a disagreement and a change in capacity. Build a working agreement, talk through an ordinary problem and change the plan without quietly passing unfinished work to someone else.



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WORKING ACROSS ORGANIZATIONS

What to work on

- Make the common output, each partner's contribution and the approval route explicit.
- Discuss an ordinary disagreement using observable facts and practical options.
- Revise scope when time or people change, then confirm the new commitments.

Before you start

Choose a modest fictional project or one you're authorized to prepare. Use the agreement to coordinate the work. It cannot authorize contracts, payments, institutional endorsement or data sharing; check those through the proper routes before making an external commitment.

AGREE THE SHARED PURPOSE BEFORE DIVIDING TASKS

Ask each partner what a useful result would look like for the people it's meant to reach. Turn a broad aim into something you can point to, such as an accurate pantry leaflet, a staffed discussion or a joint question brief. If those aims don't fit the time and people available, reduce the project while it's still a proposal.

Agree what belongs in the shared work

Write the audience, purpose and minimum acceptable result in ordinary language. For a leaflet, this might include verified service information, a clear next step and formats the audience can use. A display concept or portfolio version can be considered separately. Naming an optional addition prevents it from becoming an unspoken condition for finishing the essential work.

Ask each organization to explain what it can contribute and what it needs from the other. Count review, coordination, access checks and revisions as work. A design task depends on stable content; a service-information check depends on an available, authorized contact. Promising a finished leaflet before those dependencies are understood invites a late disagreement about responsibility.

Keep authority attached to the specific action

A student can prepare copy without being authorized to publish it. A partner can suggest a logo without controlling permission to use it. Identify who verifies facts, who approves each organization's participation and who can authorize release. If a service or university unit must approve its information or name, obtain that confirmation through the designated route. Do not treat a helpful volunteer as the service's spokesperson.

AGREE THE SHARED PURPOSE BEFORE DIVIDING TASKS

Check separately whether a draft may be shared outside the working group, photographed, credited or reused in a portfolio. A collaboration does not create permission to exchange membership lists or service-user records. Often the project can use public information and fictional test details instead. Keep any necessary restricted records in their approved system with the appropriate access.

Write reciprocal expectations

The University of Michigan's sponsorship guidance describes a specific relationship between a student organization and a university unit, with expectations in both directions and regular review. For an ordinary joint project, borrow the idea of making each side's responsibilities clear. That does not give two student groups sponsored status or a university agreement. Source: The Sponsorship Agreement, linked in the further guidance.

Read the proposed tasks back with the people who would do them. Ask whether the result, deadline and available time fit. Record acceptance, a requested change or an unfilled role. "The design team will handle it" is incomplete when no one has agreed to the actual amount of work. Confirm the review point at which partners can revise or stop the plan.

WHEN THE PROJECT CROSSES THE CAMPUS BOUNDARY

A campus group can work with a community organization while each keeps its own responsibilities. Before anyone promises dates, volunteers or publicity, work out which decisions belong to the student group, which belong to the campus and which belong to the host. A friendly invitation starts a conversation. It doesn't settle every arrangement needed to carry it out.

Make one task clear on both sides

Start with the same short description: the requested result, who will use it, what students would do and what the host would provide. Ask both contacts to correct it. Otherwise, one side may picture a small volunteer task while the other expects a service the students are not trained or authorized to deliver. Include preparation, travel, review and follow-up when you describe the commitment.

Find the actual campus route for the proposed activity and the host's arrangements for its site. Depending on the task, questions may concern supervision, training, access, travel, spending, information handling or publication. Ask which requirements apply; avoid copying a checklist from another project as if it were permission for this one. Record the responsible contact for each unresolved item.

A fictional partnership with two unfinished approvals

A campus environmental society is invited to help a neighborhood center prepare an information table about its existing repair events. The center asks for a checked one-page schedule and two student volunteers at a Saturday session. The society's committee can approve its own draft plan. Its campus contact must confirm the off-campus volunteering arrangements. The center's coordinator approves service information and visitor-facing materials.

WHEN THE PROJECT CROSSES THE CAMPUS BOUNDARY

The committee agrees that the idea fits its purpose and accepts one student's offer to prepare an internal draft from the center's public information. That bounded drafting task is authorized; publication and event attendance are still pending. Only one volunteer has confirmed Saturday availability, and the campus check is still pending. The coordinator has not yet checked the event details. The draft announcement nevertheless says, 'Our partnership is confirmed. Meet our team on Saturday.'

That announcement skips several different questions. Committee support establishes the society's interest in the plan. It doesn't confirm the campus arrangements, the host's information or a second volunteer. The group keeps the announcement in draft and sends each contact the question that belongs to them. It also asks the center whether one confirmed volunteer would meet its needs, without assuming the answer.

A usable status note

The society has agreed to develop the proposal. A student will draft the schedule for the center's factual review. The campus volunteering check, the center's approval of the schedule and the staffing arrangement remain pending. The coordinator and campus contact will be asked what must be resolved before an announcement or attendance commitment can be made.

The student can continue the authorized drafting task while those questions are checked. If the host needs two people and another volunteer does not accept, the group needs a revised arrangement or a clear pause. It cannot assign an absent member, promise that someone will turn up or describe the center as responsible for an unaccepted gap.

WHEN THE PROJECT CROSSES THE CAMPUS BOUNDARY

Keep a small two-setting record

The result both groups are considering and the people it is meant to serve

What the student group has actually agreed, and what remains proposed

The campus contact, the question they own and the current answer or pending status

The host contact, the question they own and the current answer or pending status

Each accepted student task, available time and support needed

Who may confirm the information, publish the notice and communicate a change

WHEN THE PROJECT CROSSES THE CAMPUS BOUNDARY

What will trigger a smaller plan, a new date or a pause

For the repair-event example, 'committee interested; campus check pending; host review pending; staffing unresolved' is a useful summary. It is more accurate than a single 'approved' checkbox. Use the record to ask for the next answer, then update it from the actual reply. Keep agreements in the approved location and follow the applicable record-handling process.

Joining the work before you hold office

If you are new to the society, you can ask for a bounded contribution: 'Could I compare the draft schedule with the center's published information and mark anything that needs checking?' Ask who will show you the current source and review your notes. This gives you a real part in the work without taking over the coordinator's authority or accepting responsibility for an event you cannot attend.

If you already lead the group, tell the newcomer what their task connects to and what happens to their work. A checked draft should reach the person who can act on it. Avoid asking someone to collect information that nobody will review, or treating a first task as automatic consent to join every future activity.

WHEN THE PROJECT CROSSES THE CAMPUS BOUNDARY

When the two sides give different answers

Name the specific conflict and bring it back to the relevant contacts. For example, the host may be ready to advertise while the campus arrangements remain pending. State both statuses and ask what can proceed. Do not choose whichever answer makes the project easier or tell one organization that the other has accepted something it hasn't. The next useful result may be a smaller task both can support.

NEGOTIATE AN ORDINARY WORKING DISAGREEMENT

For an ordinary disagreement about timing, standards, credit or a task someone understood differently, start with the work and its effect. “The draft lists hours that the pantry has not confirmed” gives you something to check together. “You never listen” puts the other person on the defensive and still leaves the next action unclear.

Hear the reason behind the proposed solution

Ask each partner to explain what they are trying to protect. A service group may worry that a striking design makes essential information hard to find. A design group may worry that repeated late copy changes make a coherent result impossible. Restate both concerns and ask whether you have understood them. Understanding a concern does not require accepting every proposed solution.

Try this fictional exchange. The food collective says, “Students need the hours and access route quickly, and those details must be checked.” The design society replies, “We need stable copy before we can finish the layout.” A useful response is, “Could we agree the essential copy first, give the service contact one clear factual review and set a cutoff for nonessential changes?” The proposal addresses the dependency instead of deciding which partner cares more.

Compare options against shared criteria

Return to the agreed audience, required accuracy, access needs, available hours and deadline. The partners might compare a simple approved leaflet now, a smaller information notice or a later illustrated version. Describe what each option would require and who would have to agree. Avoid declaring a compromise fair merely because each side gives something up; the result still needs to work for its audience.

NEGOTIATE AN ORDINARY WORKING DISAGREEMENT

Michigan's ombuds guidance encourages early consultation, attention to missing perspectives and clear professional boundaries in conflict. Those are useful questions for a small project discussion. The guidance does not guarantee agreement or turn student officers into trained mediators. Source: Principles of Collaborative Conflict Resolution, linked in this chapter's sources.

Know when the working conversation is insufficient

A missed draft and a serious allegation need different responses. Threats, discrimination, harassment, suspected financial misconduct or immediate safety concerns belong in appropriate campus channels. Follow applicable reporting requirements and seek qualified support. Do not ask peers to investigate a complaint or require someone to meet the subject of an allegation as a condition of continuing in the organization.

For an ordinary task disagreement, record the revised arrangement and a short review point. If the partners cannot agree, identify which part can pause and who can help with process. Do not write "resolved" merely because the meeting ended politely. Resolution should be visible in an accepted next step or a clear decision to stop the shared work.

MANAGE A CHANGE WITHOUT SHIFTING HIDDEN WORK

Someone's available time can change after they agree to a task. Treat that as information the project needs. Ask what they can still do and what handover would help, without demanding a private explanation. Accepting one task never meant accepting an unlimited amount of extra work.

Recalculate the work that remains

List unfinished outputs and their dependencies. Separate work already completed from work someone hopes to finish. Count coordination and review as well as production. Then compare that demand with hours people have actually confirmed. If the plan needs six hours and only three remain, sending more reminders does not close the gap.

Change the scope before shifting the burden

Possible responses include reducing the output, moving the deadline, finding someone who freely accepts a defined task or pausing. Check which option preserves essential accuracy and access. Do not solve a time problem by dropping a necessary review or removing an access format without resolving the audience's needs. An attractive extra may be the part to defer.

A revised request should be specific: "Could you spend up to one hour checking the approved text by Thursday, or would that need another owner?" Give the person room to decline. If they cannot accept, record the gap. Avoid describing a reassignment as agreed merely because it was posted in a group chat.

MANAGE A CHANGE WITHOUT SHIFTING HIDDEN WORK

Tell the people whose plans are affected

A changed deadline may affect a service contact, publicity plan or room booking. Identify those dependencies and have the authorized person send the relevant update. State what has changed, what remains possible and when a decision is needed. Share the project consequence rather than the volunteer's personal circumstances.

Leave the next version easy to use

Keep one clearly identified current draft and record the reason for the change, accepted owners, approvals still needed and the next check. Preserve records under the applicable process; do not delete a partner's work to remove a disagreement. At the end, distinguish what was delivered, what was used and any outcome that has actually been observed. A finished leaflet alone cannot establish improved access to food.

TWO GROUPS AND A DIFFERENT IDEA OF SUCCESS

Fictional case. A Campus Food Collective and a Design Society propose a pantry leaflet. The collective wants students to find reliable service information. The society hopes to create an illustrated piece its members can later show in portfolios. The pantry's current opening hours have not been confirmed for the leaflet, no final publication approver is recorded and permission for portfolio use has not been checked. Neither group has authority to share pantry-user information.

The preliminary design estimate is six hours: two for layout and one each for accessible text, review, revisions and final proof. After a change in availability, the design lead reports that only three volunteer-hours are confirmed for the next two days. The collective asks for the original version by Friday and suggests using photographs of pantry users to make it more personal. No permission for those photographs is established.

Identify the decisions hidden inside the request

The partners need to agree the essential output and who can release it. They also need current service facts, a workable review timetable and a revised allocation of effort. The proposed photographs and later portfolio use are separate permission questions. Enthusiasm about the project cannot answer them. Do not collect service-user stories or images to rescue the design concept.

Prepare a smaller proposal

A defensible proposal is a simple text-led leaflet using verified service information and an appropriate accessible version. The design team can ask whether three hours would cover one hour of simple layout, one of accessible-text preparation and one of final checking and revision. That estimate is an option to test with the people doing the work; it is not an instruction that those people have already accepted.

TWO GROUPS AND A DIFFERENT IDEA OF SUCCESS

The food collective would ask the designated pantry contact to verify facts and identify the publication approval route. It must confirm that the contact can review within the proposed timetable. If essential information or approval is unavailable, the leaflet should remain a draft or the partners should seek an authorized smaller alternative. Do not fill gaps from an old poster simply to meet Friday's date.

Make the new agreement real

Before proceeding, each proposed owner confirms the task, time allowance and first check. The partners name the current copy and the point after which nonessential changes move to a later version. The simplified plan defers illustrations and portfolio reuse pending a separate discussion and any required permissions. It does not transfer all unfinished design work to the most available volunteer.

A short status message could say, "The illustrated leaflet will not fit the confirmed time this week. We propose a simple accessible version using checked pantry information. Release still depends on factual review, the appropriate approval and volunteers accepting the revised tasks. If those are not confirmed by [agreed cutoff], we will keep the file marked draft and decide the next date through the agreed route."

Practice the next change

The pantry contact confirms the service facts but cannot complete the publication review before Friday. Revise the plan and message. Explain why factual verification does not, by itself, equal permission to release. Then identify evidence that would show the collaboration worked: for example, accepted responsibilities, a checked final version or a test reader finding the service contact. Do not claim increased pantry use from the existence of the leaflet.

The minimum useful output and the optional work to defer

TWO GROUPS AND A DIFFERENT IDEA OF SUCCESS

The unresolved permission or approval and its proper route

The revised tasks, confirmed capacity and explicit acceptance still needed

BUILD A SHARED PROJECT AGREEMENT

Use these prompts to keep a working record for a small joint project. They help you coordinate; they are not a contract or permission to act for another organization. Keep sensitive records and individual complaints elsewhere. Let each partner correct the draft before treating it as agreed.

The partners and the person each has authorized to coordinate this work

The intended audience and the shared result we are trying to provide

The minimum acceptable output and what is outside the current scope

The facts, access needs and quality checks the output must meet

Each task, its proposed owner, time allowance and acceptance status

BUILD A SHARED PROJECT AGREEMENT

The dependencies, review dates and publication or implementation approver

Permissions needed for names, logos, images, information or later reuse

How an ordinary working disagreement will be raised and who can help with process

What will trigger a smaller scope, new date or pause and who can decide

Where the current record is kept and how unfinished work will be handed over

BUILD A SHARED PROJECT AGREEMENT

Test it before relying on it

Ask one person from each partner to explain the next action without your help. Can they distinguish a proposed assignment from an accepted commitment? Can they locate the final approval route? If their answers differ, revise the record. A signature or friendly reply is not a substitute for checking the permissions relevant to the actual action.

Record a change

What changed and which confirmed fact or constraint requires a revision

The output, owner, deadline or dependency that will change

Who has accepted the revised work and who must receive a status update

At the review, compare the agreed output with what was delivered and ask what coordination cost each partner carried. Record one practical adjustment for a future project. Keep that review specific; a successful small collaboration does not establish that the same arrangement will work with every partner or at a larger scale.

OPTIONAL SUPPORT FOR A COLLABORATION CONVERSATION

Optional notes for trying a collaboration conversation in groups of three. Allow 45 minutes. Two people represent the fictional organizations and the third observes. Offer a written response or another agreed method. Bring the pantry-leaflet case and working-record prompts, leaving real service-user information and people's personal conflicts out of the activity.

Discover the different aims

Use five minutes for a first response on your own and five for the partners to explain their aims. The observer watches for a preference being treated as a requirement or a decision being made without authority. Ask each partner to restate the other's practical concern before suggesting a solution. Understanding the concern doesn't require agreeing with it.

Negotiate an achievable output

Give the group ten minutes to propose a minimum useful leaflet and a review route. Ask the observer to identify every sentence that assigns work. Has the proposed owner had an opportunity to accept or change it? Introduce the reduction from six estimated hours to three confirmed hours if participants have not addressed it. They must change the plan rather than claiming the original work can happen through extra commitment.

Rehearse the changed message

Use ten minutes for a short conversation and written status update after the publication reviewer becomes unavailable. Ask participants to distinguish a verified fact from release approval, and a proposed new date from an agreed one. The observer should check whether the message exposes a volunteer's private circumstances or tells an audience that an unfinished product is ready.

OPTIONAL SUPPORT FOR A COLLABORATION CONVERSATION

Give feedback on the work

- Purpose: the plan names a shared audience and usable output while making different partner interests visible.
- Authority: factual review, publication, data and reuse permissions are treated as specific questions, with gaps left visible.
- Feasibility: hours and dependencies reconcile, optional scope can be deferred and revised owners explicitly accept.
- Disagreement: participants discuss observable work and hear both concerns without assigning motives or treating serious allegations as a practice dispute.
- Continuity: the record identifies the current draft, accepted next steps and a point for review or pause.

Use the final fifteen minutes to swap feedback, revise the agreement and compare it with the first response. Name a change you can see: “The second version separates portfolio use from Friday’s service leaflet and leaves publication pending the named review.” Keep the feedback about the work. A role-play is not a basis for judging someone’s character, and these criteria are not a validated measure of collaboration skill.

Finish with an action the partners can actually take and a question that remains open. On a live project, check back at the agreed point to see whether the task was accepted and the record helped. If a serious concern comes up, stop treating it as practice material and use the appropriate support route.

TOOLS PRACTICE

AND SUPPORT

TOOLS PRACTICE

What will help you put this into practice?

Pick from an optional group-session plan, a longer fictional situation, feedback questions and source links. Use what helps you try a complete decision or come back to work from an earlier section.



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TOOLS PRACTICE AND SUPPORT

Choose the material you need

- If you're bringing a group together, use the optional session plan and adapt the pace.
- Use the welcome-exchange situation to bring several decisions and responsibilities together.
- Use the rubric to identify a specific revision, then check the relevant local support route.

AN OPTIONAL NINETY MINUTE GROUP SESSION

If you're bringing a group together, this optional plan works with 6 to 24 people in pairs or threes. Bring the guide, an accessible agenda, blank copies of the six original chapter tools and a fictional case for each group. Invite access requests through the host's usual process. People can speak, type, dictate or use another agreed format, without sharing personal stories or private campus cases.

AN OPTIONAL NINETY MINUTE GROUP SESSION

Minutes	Activity	Facilitator action
0 to 10	Choose a responsibility	Explain scope and let each person choose a fictional or safe live task
10 to 25	Map the decision route	Model the library case then ask pairs to identify authority and a next step
25 to 40	Make work feasible	Use the Friday program case and negotiate two specific commitments
40 to 55	Check the obligation	Calculate the performance budget and locate unresolved approvals
55 to 65	Check the claim	Rewrite the eighteen-reply claim and explain one limit
65 to 80	Complete one practical tool	Complete one tool for the chosen task and conduct a peer review
80 to 90	Read back and revise	Pairs compare revisions; each person records a next action and needed support; invite two or three examples

AN OPTIONAL NINETY MINUTE GROUP SESSION

Questions to ask together

Ask, “Which sentence in the case gives you that authority?” “What could change your recommendation?” “Who has accepted this task?” and “Could a person who missed the meeting understand this record?” These questions reveal the basis of a decision without rewarding confident performance alone.

When the group disagrees

Separate a difference in values from a missing fact or local rule. For the fictional exercise, use only the supplied facts and state what remains uncertain. For a live campus task, assign a verification step. Do not settle an actual legal, disciplinary, or safety matter by workshop vote.

After the session

Offer an optional short check-in after people have tried a tool. Ask what they used, what needed changing and whether the person receiving it could act on it. Keep only the information needed to understand how the work went. Private complaint details, medical information and credentials do not belong in the session records.

PREPARE THE WELCOME EXCHANGE

Fictional situation. Your association wants a two-hour welcome exchange for new and returning students. You have six volunteers who can each provide at most two hours this week, a \$600 approved spending limit and ten days before the proposed event. The current constitution requires a committee decision on the event plan. Campus staff must approve venue use and any outside agreement.

The information you receive

- A room request has been submitted but is not confirmed. Another accessible room is available only at lunchtime.
- A caterer quotes \$420 plus a mandatory \$40 delivery charge. Necessary printing and supplies cost \$60. The plan allocates \$80 for access support; the actual arrangement must be checked with the campus office.
- A business offers \$100 in exchange for the attendee email list and a logo on every notice. No sponsorship agreement has been approved.
- Twelve students respond in the association chat: eight prefer evening and four lunchtime. No commuter or first-year distribution channel was used.
- An outgoing officer says, “Do it like last year.” The available folder has no confirmed approval record or comparable attendance data.

What to prepare

Prepare a one-page recommendation naming the decision, confirmed facts, open questions, budget, fallback, and approval route. Add a four-action plan, two-sentence evidence summary, and short handover. Allow 30 minutes; do not invent missing facts.

PREPARE THE WELCOME EXCHANGE

A defensible recommendation

The proposed costs total \$600: \$420 + \$40 + \$60 + \$80. There is no unallocated contingency. Confirm actual access arrangements and other required costs before concluding the plan fits. Do not rely on unapproved sponsorship or share the email list. Explore an approved acknowledgment alternative.

Recommend conditional planning rather than public confirmation. Before seeking the committee decision: confirm the room and lunchtime fallback; confirm access arrangements and total cost; seek views beyond the chat; and agree a staffed plan with volunteers. This week's maximum is 12 volunteer-hours; allocate preparation within that limit and check separate availability for setup, the two-hour event, and cleanup. Set a cutoff for the outstanding answers before publicity. Reduce scope or postpone if the plan cannot be staffed, funded, or approved.

Revision challenge

The room is declined and confirmed access costs rise by \$50. Show what changes in your budget and recommendation. Do not silently remove access support or assume someone will cover the difference.

CHECK THE WORK AND TRY A REVISION

Use these feedback criteria with the welcome-exchange situation, a chapter tool or a real piece of work with private details removed. They help you talk about choices and make a revision. They are not a validated assessment, a personality score or a ranking of leadership potential.

Criterion	Ready to use	Needs revision
Authority	Decision-maker and approval route are supported by a source	Role title substitutes for authority or approval is assumed
Evidence	Claims match the supplied information and identify limits	Anecdotes become universal claims or outcomes are invented
Feasibility	Full costs reconcile and people accept realistic tasks	Budget omits required costs or work is assigned to everyone
Care	Privacy, access, and appropriate referral are considered	Private data is exposed or serious concerns become peer investigations
Continuity	A reader can find the status, next action, and owner	Record is vague, outdated, or needs the author to explain it

CHECK THE WORK AND TRY A REVISION

Give specific feedback

"Your recommendation names the library director as the decision-maker. The line about student demand still describes six messages as all commuters. Revise that sentence to name the response group, then add one route for checking whether the same need exists elsewhere." Specific feedback tells the learner what to keep and what to improve.

Keep the result in perspective

Keep a short first response, then compare it with the revised version using the same criteria. A more accurate decision route or a clearer commitment shows improvement in that task. It does not establish lasting behavior change or prove the program works across settings.

Optional notes for advisors and student affairs staff

Supply current local procedures, named contacts, and realistic permission boundaries. Explain the reason for requirements and identify decisions students genuinely control. Let participants question an unclear process respectfully. If the campus process itself creates an unnecessary barrier, help them use an appropriate route to propose a change rather than treating compliance as the only learning goal.

Completion check

Leave with one revised artifact, one action you are authorized to take, and one question you still need answered. A polished worksheet without a usable next step is unfinished.

FURTHER GUIDANCE FOR CAMPUS PARTICIPATION

Further reading for Chapters 7–9. Links checked on 4 October 2026. These campus resources and example template can help you ask better questions. They do not set universal rules, give a student officer authority or show that Assembly produces particular outcomes. The situations and review prompts here are newly reconstructed material to work through.

Tennessee Tech Member Recruitment and Retention

Useful for examining how a group describes its activities, welcomes newcomers and offers ways to contribute. Read its engagement framework as guidance for reflection. Confirm your own eligibility, training and voting arrangements separately.

Penn State RSO Constitution Template 2022 example

A historical institution-specific example of the questions a constitution can cover. Distinguish template instructions and illustrative choices from required wording. Locate your current approved rules before deciding notice, quorum, election thresholds, ties or amendments.

University of Michigan The Sponsorship Agreement

Describes expectations in a particular student-organization and university-unit sponsorship relationship. It can prompt discussion of reciprocal responsibilities; it does not give an ordinary student partnership sponsored status, signing authority or permission to share information.

University of Michigan Principles of Collaborative Conflict Resolution

A starting point for considering consultation, missing perspectives and role boundaries. It is not a guarantee of resolution or a replacement for required reporting and specialist support. Use campus procedures for serious concerns.

FURTHER GUIDANCE FOR CAMPUS PARTICIPATION

Add the local information your group needs

Record the current membership and election rules, training contact, student-organization support route, publication or branding approver, accessibility support and appropriate concern-reporting routes. Note the date checked and where the official instructions live. Keep this insert before the original closing support section so readers can move from a general resource to the actual help they need.

FIND THE RIGHT HELP

Links checked on 2 October 2026. These sources support selected practical ideas and further reading. Their procedures belong to their own institutions or contexts. They do not set your campus rules or establish that Assembly has been evaluated. The cases, tools, optional group session and feedback criteria are material to help you think through the work.

University of Northern Iowa officer transition guide

Use for transition preparation, closing obligations, organizing records, introductions, and a joint handover. Apply your own institution's registration and access procedures.

Tennessee Tech officer transitions

Offers incoming and outgoing officer resources, reflection tools, and a transition meeting agenda. Older workshop dates on the page are not current event invitations.

Tennessee Tech effective meetings

A campus practice reference for preparation and useful meeting structure. Check your constitution for the rules governing decisions.

Tennessee Tech finances and funding

An example of institution-specific financial guidance. It demonstrates why funding and purchasing requirements must be checked locally rather than assumed.

Section508.gov accessible meetings

U.S. federal guidance with practical preparation ideas for in-person, remote, and hybrid meetings. It does not determine every campus legal obligation.

U.S. Department of Justice effective communication

FIND THE RIGHT HELP

Explains effective communication under the ADA for covered entities. Use your campus accessibility office to identify appropriate arrangements and applicable requirements.

Build your local support list

Record the current student organization office, advisor, finance or procurement contact, accessibility contact, IT access route, and relevant safety or reporting route in your approved workspace. For each, write what they can help with and where the official instructions are located. Verify the list at the start of a new term.

Your next useful action

Choose one live responsibility, complete the relevant tool, and ask the person who will use it to tell you what is missing. Revise before the next deadline.

START WHERE YOU ARE

About the examples

The scenarios, conversations and student perspectives in this collection were created for practice. They don't describe actual people or events, and the quoted lines are suggested dialogue, not testimonials or stories from the author's life. Budgets and records are example data. Campus rules differ, so check your own requirements before using a tool or acting on a plan.

Getting involved

You don't need an officer title to use these pages. Pick a case, try the conversation and ask what you'd want to know before taking on that responsibility. The practice at the end of each case gives you a way in. For a first task you can try with support, see "Design a first contribution with support."

Already leading

Start with the situation closest to the one on your mind. You don't have to repeat the basics you know. Stay with the case through the difficult reply and the next decision, then use the short record to plan your own next step. The "Pages to keep nearby" section points back to the tools you might need.

Advising a group

Read the student's situation first, then the advisor perspective. "What student leaders need advisors to hear" looks at what students may need from you alongside your own goals, time and campus responsibilities. Use it to start a conversation with your group about what fits and what needs to change.

YOUR FRIEND KEEPS MISSING THE WORK

For students already leading

Use this when you've explained the task, checked what the person needs and agreed a reasonable deadline, but you're still watching the same people finish their work. If you're preparing for a role, try the conversation in the practice at the end before applying it to a real team.

Why this is hard to bring up

You may know exactly how to delegate and still dread sending the message. This person helped you run for office. You eat together after meetings. You don't want every conversation between you to become a performance review. Meanwhile, another teammate has noticed that being your friend seems to come with extra chances.

You care about your friend, and you need the work done. If you keep covering for them, someone else pays for the extra chance. Give your friend room to explain, then agree on something the group can rely on. If their role needs to change, that decision still has to follow your group's rules.

Scenario

Leila chairs a campus film society. Her friend Owen is the events officer. For two screenings, Owen agreed to send the final running order by Tuesday. Both times, Leila chased it on Wednesday and Priya rebuilt it on Thursday. Nobody checked whether Priya had time. Leila then thanked "our amazing events team" in the meeting and told Owen privately, "It's fine, we got there."

YOUR FRIEND KEEPS MISSING THE WORK

A third screening is ten days away. Owen has agreed to another Tuesday deadline. Priya says she won't rebuild the document again. Under the society's working rules in this example, the event team can agree to redistribute tasks. Leila can't remove an elected officer on her own.

Before talking to Owen

Find the two dates Owen agreed to and the work that was late. Leave out his photographs from a night out. They don't tell you what time he had, and you'll end up arguing about whether he deserved a night off. You already have enough to discuss: the task was late, he didn't hand it over in time and someone else finished it.

Also look at your own part. "It's fine" told Owen that the rescue had settled the matter. If you've been quietly replacing his work, he may not know how much time others spent. You can correct that without pretending his agreement did not matter.

Think through what you can offer: a smaller task, help handing it over or a change to the event plan. Don't go in assuming Priya will cover the gap. Ask what she has already done, what's unfinished and whether she wants to take on anything else. She can say no.

A first message you could adapt

"Can we talk tomorrow about the screening work? The last two running orders weren't ready on the Tuesday we agreed, and Priya rebuilt them. I said it was fine instead of explaining the effect, which wasn't fair to either of you. For this screening, we need an arrangement that doesn't depend on someone rescuing it at the end. What part can you realistically take on, and what would you need to do it?"

YOUR FRIEND KEEPS MISSING THE WORK

Find a private place and a time you can both manage. If speaking directly could expose you to threats, harassment or retaliation, get campus support first. You don't have to prove you're brave by using this script. For an ordinary work disagreement, leave room for the other person to correct what you've understood.

What to listen for

If Owen says the instructions were unclear, look at them together. If something he needed was missing, fix that. If the role is bigger than he expected, ask what he can keep doing and what needs to move. If he forgot, discuss whether a reminder or an earlier check would help, and agree who will do it. You can make the work smaller and more reliable without deciding whether his reason is good enough.

Don't ask for a diagnosis, a family explanation or proof that he's stressed. You need to know what he can agree to now. You also can't promise to remove every responsibility while leaving the title unchanged. Check the organization's rules if the officer role itself needs to change.

If the reply gets personal

"You know I've had a lot going on."

"I hear that. You don't need to explain private things to me. I do need to know whether you can send the speaker timings by Tuesday, or whether we should arrange a handover now."

"You always redo things anyway."

"That's worth looking at. Tell me which changes were unnecessary. Let's agree what a usable running order needs and leave stylistic choices with the person making it. We still need a version at the agreed time."

YOUR FRIEND KEEPS MISSING THE WORK

"I thought we were friends."

"We are, and I want us to be able to talk honestly. Priya has been doing extra work she didn't agree to. I can't ask her to keep doing that. I'm trying to work out what you can actually take on."

These replies won't help if you use them to win the argument. If Owen points out that Leila changed the brief twice, they also need a cutoff for her changes. The chair's part in the problem belongs in the conversation.

Agree on the next screening

Owen says he can collect the confirmed speaker timings but can't assemble the running order this week. Leila asks another member whether they can assemble it from the existing template; that person freely accepts. Owen agrees to put the confirmed timings and outstanding questions in the approved shared folder by Tuesday at 6 pm. The two agree on a Monday check while there is still time to adjust.

Leila writes down who will finish each part, when they'll check in and what happens if it's still missing. She leaves out labels such as "Owen is unreliable" and any personal explanation. If the timings aren't ready at the check, the team will ask the event lead who has the authority to choose between the shorter approved format and postponing that part. Priya isn't the automatic backup.

Go back to the person who covered the gap

Leila speaks to Priya separately: "You rebuilt both running orders after the agreed dates. I thanked the team without naming that work, and I didn't ask whether you could take it on. I'm sorry. I've now agreed a different arrangement. You're not the backup for this screening."

YOUR FRIEND KEEPS MISSING THE WORK

Leila asks whether Priya wants that work acknowledged at the next meeting and what would be accurate to say. Priya may want the record corrected without being put on the spot. A thank-you matters, but the workload has to change too. Next time, the group needs to count scheduling, chasing replies, formatting and checking as work that takes someone's time.

When the revised agreement is missed too

Come back to what you actually agreed: "We agreed on a Monday check and Tuesday handover. Neither happened, and we still don't have the work. We need to review which responsibilities you can hold. I'll bring that question through our officer-review process rather than decide it between the two of us."

Check the actual constitution and campus requirements before proposing removal, a vacancy or a change in membership. A task handover, resignation, removal from office and removal from the organization are different actions. You can't turn one into another because the deadline is close. If your friendship creates a conflict in a formal review, disclose it through the appropriate process and ask who should chair or review the matter.

Tell the team what it needs to keep going: who is doing each task, what has paused and when the next decision will happen. Don't circulate screenshots to prove you were right. Keep the relevant records where they belong and give the person the chance to respond that your process requires.

Keep this small record

1. What the person agreed to do and where that agreement is recorded
2. What happened, including changed instructions or missing support
3. What extra work landed on other people
4. What each person has now agreed to do
5. When you'll check, the fallback and who can decide it
6. What happened at the check and whether the officer role needs a formal review

YOUR FRIEND KEEPS MISSING THE WORK

Leave personal explanations out of the shared record. Record a disagreement as a disagreement, not as an admission.

The friendship may still feel awkward

Owen may be upset for a while. That alone won't tell you whether you were fair. Look back at the parts you can check: did he get a chance to respond? Did you own your part? Did the new owners agree? Did Priya stop getting landed with the work? You can care about the friendship without treating a smooth conversation as the only acceptable outcome.

If you are preparing for a role

Practice both sides using the case. In the second round, add this detail: Leila gave Owen the wrong template and only corrected it on Tuesday afternoon. What should change in their agreement? Then work out what you could do as an ordinary member, such as asking for a clearer task or declining extra work you never agreed to, and what would need someone with the relevant authority.

If you're advising this team

Student perspective: "I know we need to talk. I'm worried you'll tell me to remove my friend before I've worked out what actually happened."

Help the chair get ready to explain what happened, including their own part. Ask what the friend agreed to, what information or support was missing and who finished the work. Let the chair practice without deciding the friend's motives for them. Ask what Priya wants acknowledged and whether she has actually agreed to anything else. The student you know best may not have the whole picture.

YOUR FRIEND KEEPS MISSING THE WORK

You may need to follow a campus role-review or conduct process, with safeguards for everyone involved. You may also want the chair to learn how to raise a problem early and share work fairly. Help with both: “Let’s prepare the task conversation first and check the formal process separately. If a role decision is needed, I’ll help you find who can handle it. I won’t assume you can remove an officer by yourself.”

If you’re close to either student, check who else can help. Being the advisor doesn’t automatically make you a neutral mediator. Keep the next step grounded in the case facts and the campus rules.

Pages to keep nearby

Assembly’s “Make shared work possible” and “Run the next useful meeting” have the basic commitment record. Use them alongside this case when you need to write down the new agreement or check who has taken on the extra work.

Source note

Oklahoma State University’s student-leader guidance covers clear expectations, early conflict conversations, delegation, credit and communication boundaries. Macalester’s published code shows why a leader can’t assume that removing someone is an informal officer decision: its member-removal process requires explicit institutional authorization. These are examples from those institutions, not rules for every campus. The case and practice are original teaching material; see the collection’s opening note about the examples.

<https://campuslife.okstate.edu/student-org-resources/support-for-leaders>

<https://www.macalester.edu/leadership-engagement/code-of-conduct/>

Sources checked 5 October 2026.

YOUR ADVISOR DISAGREES AND THE DEADLINE IS REAL

For students already leading

Use this when you know the usual approval process but can't tell what your advisor means by no. Is it advice, a missing requirement or a decision they're responsible for? If you're preparing for a role, practice the exchange and the questions you'd want answered before accepting office.

When disagreeing feels risky

An advisor may have supported your group for years. They may also teach you, supervise your work or be someone you hope will write a reference. It can feel easier to change the whole plan than ask what "I can't support this" actually means. Other committee members may be ready to argue that the organization belongs to students and ignore the message altogether.

You still need to know which part of the plan is blocked, why and who decides. You can ask that clearly while treating the advisor and the relationship with respect.

Scenario

A subject society votes to replace its annual keynote evening with a small skills workshop. Members said the keynote timing was hard for commuters. The advisor, Dr. Chen, replies: "We've built a reputation through that lecture. I won't support replacing it. Keep the keynote and add the workshop afterward."

The student president, Amara, has a room-request deadline on Friday. Her team has time for one event. A workshop after the lecture would finish even later. Neither event has been advertised. Dr. Chen also points out that the workshop facilitator's fee hasn't gone through the required campus process. The team hasn't yet confirmed which decisions need advisor approval under the society's documents.

YOUR ADVISOR DISAGREES AND THE DEADLINE IS REAL

Separate the questions before defending the plan

The message mixes three things: the event format, the time the team can give and the facilitator's fee. Write each one down separately. There may be a real payment requirement to meet even if the group is allowed to choose a different event.

Amara asks the treasurer to check the fee with the finance office and reads the current constitution and advisor agreement. Until the advisor's role is clear, she doesn't tell the team, "It's only advice." The committee vote also doesn't settle whether they can pay the facilitator or book the room.

Keep this preparation focused on the decision. You're gathering what you need to ask a clear question, not collecting evidence to win against the advisor.

A message you could adapt

"Thanks for flagging the facilitator fee. We're checking the process and haven't committed to it. Could we separate that from the event format? The committee chose the workshop because of the timing feedback and the hours we can give. We can run one event this term. Is keeping the keynote required under our current arrangements, or is it your recommendation? If it's required, could you show us the rule or point us to someone who can confirm it? We need an answer by Thursday afternoon to make the Friday room deadline."

If you haven't agreed a response time, ask when the advisor can reply. Explain which booking or decision is waiting. Be clear about the question; you don't need a long apology for asking it.

YOUR ADVISOR DISAGREES AND THE DEADLINE IS REAL

Be ready to learn something you missed

Dr. Chen may know about a funding condition, a promise to a speaker or required training the team hasn't seen. Ask for the relevant agreement through the right campus channel. If it applies, work it into the options. You can own that omission and still ask about the other parts of the plan.

"We hadn't seen that commitment. We'll account for it. Could we work out the smallest plan that meets it within the team's available time?"

The advisor may instead be describing a concern that can be tested. If the concern is that a workshop will be too narrow, the team could explain who it is for, what members will do and how it will check whether the format was useful. Don't promise a second event, more volunteers or a larger audience simply to make the disagreement end.

When the answer is still vague

If the answer is "This is how we've always done it," try: "That history is useful. We still need to know who decides the format now. Could we ask student activities to clarify that question together?"

If the answer is "You're not listening to my experience," try: "We've heard your concern about losing the lecture's reputation. We're weighing that alongside member access and the time we have. We'd value your advice on those tradeoffs. We also need to know which approval is required."

The advisor can still influence the decision, even if the committee ends up disagreeing. Don't turn the exchange into a campaign of identical complaints or assume a private disagreement proves bad faith.

YOUR ADVISOR DISAGREES AND THE DEADLINE IS REAL

Ask the campus office a question it can answer

"Could you help us check who decides our society's event format? The committee chose a workshop instead of the annual lecture. Our advisor prefers the lecture and has said they can't support the change. We're checking the facilitator-payment process separately. Which document sets out who decides the format? Do we need advisor approval for the room request or the activity? The booking deadline is Friday. What can we do while this is being clarified?"

Send the relevant documents and exchange through the office's appropriate channel. Keep the question specific. If you're making a formal complaint, use that process and its requirements rather than presenting it as a routine question.

If the deadline arrives before the answer

The team still needs a decision about the unresolved booking. Ask the relevant office whether a provisional request, a different date or another permitted step is available. Don't sign the advisor's name, omit the fee, submit a misleading version or assume that a silent inbox grants approval.

Choose a permitted option the team can manage. A later workshop might be the best choice available, even though you could lose the room or disappoint members. Be honest about that: "We haven't confirmed the approval process yet, so we can't announce the workshop date. We're asking about a later booking and will update you on Monday." Make sure someone has agreed to give that update.

The delay doesn't give your team more time to do two events. Keep that limit in the conversation.

YOUR ADVISOR DISAGREES AND THE DEADLINE IS REAL

If the advisor also grades or supervises you

If the advisor also grades or supervises you, you may want support before raising the disagreement directly. A student-organization office can help with role questions. An ombuds or student conflict service, where available, may help you consider options or prepare a conversation. Check whom the service serves, its confidentiality limits and whether contacting it counts as a formal report. Those functions differ between institutions.

If there are threats, discrimination, harassment or retaliation concerns, use the appropriate formal or specialist route. A mediated meeting is not a required first step for every situation. Don't promise that a private conversation or a support service will keep all information confidential before checking its rules.

Leave the answer where the next committee can find it

Keep a short note with four entries:

1. What students proposed and why
2. Each concern or requirement, its source and what still needs checking
3. Who decides each part and the answer they gave
4. What can happen next, who has agreed to do it and what remains open

If the office confirms that the committee decides the format while staff approve payments, write that distinction clearly. If the advisor has a defined approval role, record its scope and required steps. Don't summarize either answer as "We can do what we want" or "The advisor decides everything."

Once the event question is settled, talk about how you'll work together next time. Which decisions need advice, which need approval, what does the advisor need to see and when can each side reply? Who helps when someone is unavailable? Write that down using the campus rules. The agreement can't give the group powers it doesn't have.

YOUR ADVISOR DISAGREES AND THE DEADLINE IS REAL

You may still disagree at the end

Suppose the campus office confirms that students choose the program, while the facilitator payment still needs review. Dr. Chen is still disappointed. The team meets the requirements, asks for the advisor's input on the workshop and records its decision without announcing a victory over them. They can keep working together while preferring different events.

Or the office confirms that the funding really is tied to the lecture. The committee then looks at changing the funding arrangement, running a lecture it can manage or deferring the event. That answer may be frustrating. It does tell the team what would have to change for the workshop to happen.

If you are preparing for a role

Practice asking three questions before you accept office: "Which decisions does the committee actually make?", "What does the advisor approve or sign?" and "Who helps if we disagree about that boundary?" Then use the case to draft a clarification request that doesn't presume the answer. Notice that asking about authority is itself a useful contribution, even when you're not the person authorized to make the final decision.

If you're advising this team

Student perspective: "I want your experience. I also need to know when I am allowed to make a choice you wouldn't make."

Read your response as a student trying to work out what they're allowed to do. Name the fee requirement. If keeping the lecture is your recommendation, explain why it matters to you and ask how it compares with the students' aims. Check your role before treating discomfort as a veto. If you do have a specific approval duty, be clear about that too.

YOUR ADVISOR DISAGREES AND THE DEADLINE IS REAL

Try: “I was worried about losing the lecture and about the fee process. I should have separated those. The fee needs the required review. I’ll check my role in the format decision rather than assume it. Could you show me how the workshop serves members and fits the time you have?”

You may want continuity, learning or careful use of resources. Could the students’ format meet that goal another way? If you can’t review it in time, say so and identify the right alternative contact. Sometimes supporting students means helping them carry out a permitted choice you wouldn’t have made.

Pages to keep nearby

Use Assembly’s authority map to record the answer about who decides. Keep the separate questions from this case visible, so a payment check doesn’t quietly become a decision about the whole event.

Source note

Stanford’s advisor guidance emphasizes student-led decisions within university policy and clear expectations. Nebraska–Lincoln’s guidance illustrates a more specific operational arrangement: an advisor’s event concern can pause approval, and financial requests have a defined approval chain. These examples show why “an advisor is only advisory” is not a safe universal rule. The University of Oregon’s Student Conflict Resolution Center offers conflict coaching and student-organization governance support; availability and scope must be checked locally. The case and scripts are original teaching material.

<https://ose.stanford.edu/student-orgs/policies/non-student-involvement/advisor-roles>

<https://involved.unl.edu/recognized-student-organization-advisor-manual/advisors-approval/>

<https://scrc.uoregon.edu/>

Sources checked 5 October 2026.

YOU INHERITED RECORDS THAT DO NOT ADD UP

For students already leading

Use this when the handover is over, the next deadline is close and the records don't back up what you were told. If you're considering a role, use the case to work out what to ask for and how you'd handle an incomplete answer.

The pressure to start with a clean slate

Everyone wants a fresh start. The outgoing team is proud of its year, a vendor wants an answer and your members are asking when the next event will happen. You may worry that saying "I don't know yet" makes you look unprepared. It can be tempting to fix the spreadsheet yourself, pay a small amount personally or announce that the previous officers left a disaster.

Make the gaps clear enough that someone can help you deal with them. You can take responsibility for the next reply without claiming you've checked the whole of last year. A missing record also doesn't tell you what another person did or why.

Scenario and example data

Tariq becomes treasurer of a campus culture society on Monday. The outgoing treasurer sends a spreadsheet showing \$1,900 "left for events." The campus account portal shows \$2,400. An approved \$600 room payment has not yet appeared in the portal. A caterer emails a \$450 invoice marked overdue, but Tariq can't find the associated approval or confirmation that the service was delivered. The former president says, "That was sorted. Just use the number in the spreadsheet."

YOU INHERITED RECORDS THAT DO NOT ADD UP

The new committee wants to order \$1,200 of supplies on Friday. Recognition renewal is due next week. Tariq has role-based access to the portal but can't open the old officer's personal inbox. The amounts in this example don't establish a real debt or anyone's legal responsibility.

Keep the uncertainty out of the next purchase

Tell the committee you can't yet check Friday's order against a reliable available balance. Ask the finance contact who handles this what needs to pause while the records are checked. Existing due dates still need attention: don't use the pause to ignore them, cancel a contract or stop every activity without the authority to do so.

Keep the recognition renewal moving through its usual process. Don't let the money question hide another deadline. Agree who will contact finance, who will find the event records and who will complete the renewal. Finding the gaps doesn't make Tariq responsible for filling every one.

Work out what each number actually tells you

The portal's \$2,400 is a recorded account balance at a particular time. The supplied facts say the approved \$600 payment has not posted. Subtracting that known pending payment gives \$1,800 before resolving other items. That is already different from the spreadsheet's \$1,900.

If the \$450 invoice is an additional valid unpaid charge, the same provisional calculation would fall to \$1,350. But the case has not established that. The invoice might be unpaid, already paid, duplicated or connected to another transaction. Even \$1,350 is not a verified spending limit: other obligations, restrictions or records may still be missing. Keep the scenarios separate rather than selecting the number that allows Friday's order.

YOU INHERITED RECORDS THAT DO NOT ADD UP

The \$500 difference between the portal and spreadsheet is not evidence that \$500 was taken. Dates, pending transactions and errors can create differences. The task is to reconcile supported entries through the campus process, not to invent a balancing figure or decide a motive.

Ask for records rather than reassurance

"I'm checking the records the new team has inherited. The spreadsheet shows \$1,900 and the portal shows \$2,400 as of Monday. I've found a \$600 room payment that hasn't posted, but I can't yet explain the rest of the difference. Could you show me which transactions make up the spreadsheet total and where the catering approval, invoice and payment status are recorded? If something is missing, please mark it missing rather than recreate an approval. Could we start with those items at our handover meeting?"

This gives the former treasurer something specific to find. Ask them to transfer the relevant organization records through the approved process. Don't ask for their personal password, search unrelated messages or put account credentials in the handover document.

When the answer is "You're making this a bigger deal"

"The new team needs a number we can back up before it approves more spending. I haven't reached a conclusion about what happened. These are the records we have and the questions still open. If you can't find the missing items, I'll take the same list to finance and ask what to do next."

YOU INHERITED RECORDS THAT DO NOT ADD UP

Someone sounding certain doesn't fill the gap in the records. Someone sounding frustrated doesn't prove they're hiding anything. Keep asking for the evidence you need, and let the right office handle anything outside your role.

Give the finance office the unresolved questions

"Could you help us check the records after our officer handover? The portal balance, outgoing spreadsheet and an outstanding invoice don't yet match. We've found one approved payment that hasn't posted. Which records do you need to check the invoice, and should the new purchase wait? We haven't signed off the outgoing records as complete. Recognition renewal is also due next week; do we need any finance clearance for it?"

Send records through the approved campus channel and only to people who need them. Use transaction references rather than copying full account numbers or personal payment details into a general committee chat. If the office asks for documents you don't have, say so. Don't fabricate a receipt, backdate minutes or label an old request "approved" because the event went ahead.

What to say to the vendor

First confirm who is authorized to respond. A holding reply might be: "We've received invoice [reference] and are checking its status with the campus office that handles payments. Could you confirm the service date and send the relevant invoice or order reference through [approved route]? We'll provide a status update by [agreed date]. I can't confirm a payment date yet."

YOU INHERITED RECORDS THAT DO NOT ADD UP

Replace every bracket with a verified detail before sending. Don't promise that the invoice will be paid tomorrow, deny a valid obligation or accept new terms just to get the message out of your inbox. If the vendor raises collection action or a disputed contract, bring that to the authorized campus office promptly. Questions about liability require the proper institutional or legal advice; this exercise can't determine them.

Keep one list of the gaps

Keep a working list beside the official records. Don't replace those records with it. For each gap, write down:

- What the document says, its date and where the original is held
- What is confirmed, disputed or still unknown
- The record or answer you need
- Who agreed to follow up and when you'll check
- Which decision is waiting on the answer
- How it was resolved and where that evidence is kept

An example entry: "Catering invoice \$450: received Monday, marked overdue. We haven't located approval, delivery or payment records. Tariq will ask finance what establishes its status; the event lead will look for the approved order. We still need a checked financial position before assessing the proposed supplies order. No conclusion about fault."

Keep the old file intact under the applicable retention rules. Add corrections with a date and source so the next reader can see what changed. A neat replacement spreadsheet that erases the original mismatch makes the history harder to understand.

YOU INHERITED RECORDS THAT DO NOT ADD UP

Example data after the records are checked

The finance office finds that the spreadsheet entered the pending room payment as \$500 instead of \$600. It also locates a \$100 approved supplies reimbursement that was absent from the spreadsheet and is still pending. The \$450 catering invoice was already paid and included in the portal balance; the vendor confirms the reminder was duplicated.

Using the case's now-confirmed items, \$2,400 minus the unposted \$600 room payment and \$100 reimbursement leaves \$1,700 after those pending charges. The original spreadsheet's \$1,900 falls by \$100 for the room-entry correction and another \$100 for the omitted reimbursement, also giving \$1,700. Don't subtract the already-posted \$450 again. Tariq records the evidence and asks the office to confirm any fund restrictions and other commitments before the committee treats that figure as available for new spending. The \$1,200 purchase still needs its own purpose, budget and purchasing approval.

The team can now explain these differences and show how the duplicate invoice was resolved. Tariq hasn't personally audited the whole organization. Anything else they haven't verified stays marked unknown.

If the records raise a more serious concern

A missing receipt is not automatically misconduct. Evidence of altered documents, unexplained transfers or an instruction to hide transactions is a reason to use the designated finance or reporting route. Preserve what you're authorized to hold, restrict unnecessary access and follow the office's instructions. Don't interview members as if you were an investigator, circulate allegations or promise confidentiality you can't provide. Urgent financial or safety risks may require immediate escalation under local policy.

YOU INHERITED RECORDS THAT DO NOT ADD UP

If you can't finish the handover

Leave a clear closing note: what the outgoing officer supplied, what's still missing, who agreed to follow up and when the outgoing officer will stop being available for handover questions. Ask the relevant office what to do if a record can't be found. Don't sign a statement saying everything is complete when it isn't; ask how to list the gaps. Being new doesn't mean you have to put your name to an account you can't support.

You can ask for a second person with the right authority to review the opening record with you. Then the next decision won't depend on one tired officer remembering everything.

If you are preparing for a role

Ask to see the current role description, upcoming deadlines, approved budget, outstanding commitments, account-access process and named support contact. You don't need private member information or live account credentials to learn what the role involves. Try the case with this change: the former treasurer is unavailable for the entire week. Which checks can the campus office or approved organization records support, and which items must remain open? Write the first two messages and explain which spending statement you're not yet able to make.

If you're advising this team

Student perspective: "I'm willing to sort out the next steps. I don't want asking questions to make me look disloyal to the people who handed this over."

Take the new officer's questions seriously. Thank them for spotting the mismatch and help them get finance support. Don't ask them to tidy the number, pay personally to avoid embarrassment or sign something they can't verify. Give the outgoing officer the same fairness: check the evidence before assuming they acted improperly.

YOU INHERITED RECORDS THAT DO NOT ADD UP

You could say: “You’ve shown what we know and what’s missing. Let’s get finance to check the status and share out the urgent follow-ups. You shouldn’t have to sign these records off as complete while those questions are open.”

You may be trying to keep the organization in good standing and make the next handover easier. Help the committee find another authorized reviewer and keep the renewal moving. If the records suggest misconduct, use the designated reporting process; don’t turn the handover meeting into an investigation. Check what your own finance or approval role allows. The advisor title alone won’t answer that.

Pages to keep nearby

Assembly’s “An incomplete handover” helps you identify the next deadline and leave a usable record. Use this case with it when the documents disagree or someone asks you to sign off a past you can’t yet verify.

Source note

Dickinson College’s transition guide specifically includes pending charges, contracts and upcoming expenses in treasurer handovers. Youngstown State’s advisor handbook describes comparing transaction records with account statements, resolving differences and supporting reports with receipts. The procedures, account systems and approval powers differ by campus. The example calculations help you read the records; they aren’t financial or legal advice about a real organization.

https://www.dickinson.edu/info/20226/student_life/3906/clubs_and_organizations/3

<https://ysu.edu/student-activities/student-organization-advisor-handbook>

Sources checked 5 October 2026.

WHAT STUDENT LEADERS NEED ADVISORS TO HEAR

A practical brief for advisors and student leaders

A student can run a meeting well and still dread the conversation afterward. They may need help speaking to a friend, questioning a decision or saying they can't keep covering the work. If you're their advisor, you have limits too: other work, required responsibilities and things you hope the group will achieve. It helps when students know what those are, rather than finding out in the middle of a disagreement.

The student perspectives here are starting points for a conversation. Ask your group which ones fit and what's missing. Check your campus requirements, reporting duties and the limits of your role before relying on any of the example responses.

Tell us what your answer means

Student perspective: "When you say you can't support the plan, I don't know whether you think it's a bad idea or whether we're not allowed to do it."

Say what you're doing in that decision: giving advice, checking a requirement, approving something you're responsible for or asking another office. If you don't know yet, explain what you'll check and when. Students can work with a clear limit much more easily than a general "I'm not comfortable with this."

Try: "I recommend a smaller event because the timeline is short. Separately, this payment needs the campus review listed here. I don't make that payment decision. Let's identify what you can decide now and what the finance team needs."

WHAT STUDENT LEADERS NEED ADVISORS TO HEAR

When a proposed action is genuinely prohibited or unsafe, say so clearly and use the required process. Explain the source, the consequence and any permitted alternatives. Don't dress a binding requirement up as optional coaching, or describe your preference as an institutional rule. Students also need to know when your role requires reporting or sharing information; explain relevant limits before inviting sensitive disclosures where possible.

Ask what we want to try before improving the plan

Student perspective: "We want to try something different. It's hard to tell whether you want us to learn or want us to reproduce last year."

Ask what students want members to get from the work and what they want to learn by doing it. Tell them your goals too. Maybe you want a handover the next team can use, more people involved, accurate records, a connection to the subject or fewer last-minute requests. Explain why those things matter in your role, and which are required rather than your preference.

For example, students want a small commuter-friendly workshop; the advisor wants two incoming committee members to learn how to organize an event; the campus requires the relevant event and payment checks. They agree on one workshop, pair those two members with the current event lead and find the actual deadlines. Nobody has to add a keynote to make room for every preference.

Some goals will conflict. If a department wants a high-profile showcase and students want a low-pressure peer session, say that openly. Find out who decides and what time and resources are available. Students shouldn't quietly become extra labor for a departmental project. They also shouldn't promise departmental help that nobody has agreed to give.

Help us make the decision

Student perspective: "When you send the finished plan, we can carry it out, but we don't learn how to make one."

WHAT STUDENT LEADERS NEED ADVISORS TO HEAR

Ask students to bring the decision, two options they could carry out and the things they don't know yet. Share experience that helps them judge those options. Then leave the choice with the students who have the authority to make it, within the real rules. You could ask: "What would make you change your mind about this?" or "Who will do the work if that plan falls through?"

A new treasurer may need you to show them once and stay nearby while they try. An experienced team may need a quick check and an introduction to the right person. Agree when you'll step in and why. A presentation you would have written differently may still be a good student decision. A serious risk or a requirement that isn't being met needs the proper response. Making room to learn doesn't mean accepting preventable harm or ignoring campus obligations.

Ask who stayed behind to finish it

Student perspective: "The event looked great. I was the one staying up to fix it, and nobody asked whether I could keep doing that."

Ask who chased the replies, planned access, reassured teammates, set up the room and checked the final file. Look beyond the chair and the person on the microphone. Give students a way to talk about the workload without explaining personal circumstances in front of everyone. Being quiet and reliable doesn't mean someone wants the same behind-the-scenes job every time.

If one student keeps filling the gaps, help the group change the plan or share the work differently. A smaller event with a clear record may do more for students' learning and the institution's goals than a polished event that leaves someone exhausted. Ask how they want their contribution recognized. Praise will matter more when they can see that next time will be different.

WHAT STUDENT LEADERS NEED ADVISORS TO HEAR

Be honest about the time you have

You don't have to be available all the time. Tell students when you review requests, how much notice you need, which channel you check and who handles urgent or out-of-hours matters. Ask for a specific question and the relevant record rather than a forwarded group chat with "Thoughts?" Agree what actually counts as urgent under your campus arrangements.

For example: "I can meet for half an hour every two weeks and review requests in our agreed channel on Tuesdays. I can't promise same-day event reviews. Let's plan around the campus deadlines and find a backup contact for things that can't wait." The timing is an example to discuss, not a service level every advisor is expected to offer.

If the role asks for more time or authority than you have, raise that with the responsible office or your supervisor. Tell students what help they can count on. Don't leave them guessing whether a missing reply means no. Students also need to flag changes early, meet agreed deadlines where they can and say when the arrangement no longer works.

Make it possible to disagree with you

Student perspective: "You teach me too. I'm worried that disagreeing here could change how you see me elsewhere."

Acknowledge those overlapping roles. Explain where a student can ask about a process or raise a concern, including outside the advising relationship where appropriate. They may need a private conversation rather than a group check-in. Don't require students or advisors to try mediation where it isn't suitable. Check the confidentiality and reporting rules of any support service you suggest.

WHAT STUDENT LEADERS NEED ADVISORS TO HEAR

For an ordinary disagreement, help people separate the event decision, the relationship and any formal complaint. If you confused the issue, correct your part: “I presented my preferred format as a requirement. I’ve checked the policy, and the committee can choose within these conditions. I’m sorry for the confusion.” Make sure the correction reaches the people whose work was affected, without sharing personal details they don’t need.

Write down what you can expect from each other

Use a short conversation to agree:

- What students most want to do this term and why it matters to members
- What the advisor wants to achieve and how it fits their role
- What the campus requires and where those requirements are written
- One shared outcome you have the time and support to work toward
- What students decide, what needs approval and who answers an unclear question
- When each side is available, how to reach them and where urgent matters go
- What you’ll do if a deadline, relationship or workload problem develops
- When you’ll revisit the agreement and how you’ll tell what is working

Keep it short enough to use again. Leave private health and personal information out of the shared record. This agreement can’t override policy, give the advisor powers they don’t hold or stop a student using a formal campus process.

Ask how your involvement felt from their side

After a piece of work, ask: “Where did my involvement help you decide? Where did I leave you unsure or take over? What should we change next time?” Give students a way to answer that doesn’t require criticizing you in front of the group. Be honest about how private it is.

WHAT STUDENT LEADERS NEED ADVISORS TO HEAR

You should be able to say what you need too: earlier information, a named contact, a complete request or a smaller plan. Look at things you can both recognize. Can students explain the decision? Were the required steps followed? Did people know what they'd agreed to do? Can the next team find the record? A full room can be a good result. So can a sound decision to stop a plan that wouldn't work.

Try this alongside the cases

In the friend case, help the chair prepare a fair conversation and notice unequal treatment. Don't quietly take over the officer-review process. In the advisor case, check what you can decide and what you're recommending. In the records case, help students reach finance support and share the urgent follow-ups. Each case includes an advisor response to try.

Sources and limits

Cornell publishes expectations generated by a conference of student organizations, including support, listening, accountability and room for students to lead. It also recognizes other responsibilities in students' and advisors' lives. Nebraska-Lincoln emphasizes mutual expectations and student decisions within established guidelines. These resources support a reciprocal relationship; neither supplies a universal definition of advisor authority. The perspectives, examples and tools here were written for practice. Discuss them with actual students and advisors before treating them as a description of their experience.

<https://scl.cornell.edu/sub/sub/get-involved/campus-activities/club-advisors/expectations-advisors>

<https://involved.unl.edu/recognized-student-organization-advisor-manual/advisor-expectations/>

Sources checked 5 October 2026.

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