STUDENT ORGANIZATION
OFFICER TRAINING
for Presidents

THE OHIO STATE UNIVERSITY
OFFICE OF STUDENT LIFE
STUDENT ACTIVITIES
Before getting started

- Slides will be sent to you
- Sign the sign-in sheet
- Ask any questions you have
Discussion

• Who is a new president?
• Who is a returning president?
• Who is representing a new organization?
• Find 1-2 people around you and follow the next few slide prompts with some discussion
• As I advance the slides, discuss the next slide
Introduce yourself
And describe what your organization does
What is one piece of advice you’d like to share with both returning and new Presidents?
How do you successfully lead your organization with these types of members?

Loner
Over-achiever
Disengaged
Forgetful
Distracter
Discussion

• Wrap up your conversations and we will continue
Role of the President

Online management system requirements
- Attend president's training
- Complete general information
- Enter goals
- Upload updated constitution
- Approve organization's roster

Managing your organization
- Manage room reservations
- Utilize resource room line of credit
- Coordinate meetings and events
- Primary contact for organization
- Communicate with treasurer, officers, and members

Preparing your organization for success
- Provide a vision for organization
- Help manage conflicts
- Ensure good morale and teambuilding
- Identify and prepare future leaders
## Role of the President

Complete registration requirements

<table>
<thead>
<tr>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete President’s training</td>
</tr>
<tr>
<td>Enter and approve organization roster</td>
</tr>
<tr>
<td>Enter goals</td>
</tr>
<tr>
<td>Upload updated constitution</td>
</tr>
<tr>
<td>Enter organization’s general info:</td>
</tr>
<tr>
<td>• purpose statement</td>
</tr>
<tr>
<td>• anti-hazing statement</td>
</tr>
<tr>
<td>• type of organization</td>
</tr>
<tr>
<td>• meeting information</td>
</tr>
<tr>
<td>• registration window selection</td>
</tr>
<tr>
<td>Communicate with treasurer to complete training</td>
</tr>
<tr>
<td>Communicate with advisor to complete training and approve registration and goals</td>
</tr>
</tbody>
</table>
Role of the Treasurer

- **Approve Spending**
- **Chief Financial Officer**
- **Manage All Funds**
- **Request Funds**
- **Provide Financial Leadership**
- **Collect Dues**
- **Financial Wellness**
- **Maintain Records**

Collect Dues

Provide Financial Leadership

Manage All Funds

Chief Financial Officer

Approve Spending

Role of the Treasurer

Approve Spending

Chief Financial Officer

Manage All Funds

Request Funds

Provide Financial Leadership

Collect Dues

Financial Wellness

Maintain Records
## Role of the Advisor

### Requirements

<table>
<thead>
<tr>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend advisor training every 2 years</td>
</tr>
<tr>
<td>Approve registration, goals, and funding requests</td>
</tr>
<tr>
<td>Co-sign on a bank account for organization (optional)</td>
</tr>
</tbody>
</table>

### Leadership of Organization

<table>
<thead>
<tr>
<th>Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary resource for the organization</td>
</tr>
<tr>
<td>Provide continuity, perspective, suggestions, and advice</td>
</tr>
</tbody>
</table>
All student organizations must have an advisor
- Must be an OSU faculty or staff member
- You may have more than one advisor

Graduate and professional students and civil service employees are not eligible
- may serve as co-advisors
Officer Annual Registration Requirements

President
- Training
- Complete online registration

Treasurer
- Training
- Enter funding requests

Advisor
- Training (bi-annual)
- Approvals: Registration, Goals, Funds

Secondary Leader: Only requirement is GPA
President's Role: Registration Basics
Registration Windows

Two Registration Windows

<table>
<thead>
<tr>
<th>Window</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring Window</td>
<td>February 15 – April 30</td>
</tr>
<tr>
<td>Autumn Window</td>
<td>August 1 – October 15</td>
</tr>
</tbody>
</table>

- Organizations **self-select** their window

- Pick your Window based on officer transitions

- For new organizations: All requirements must be completed within 60 days or by the last day of the registration Window – whichever is later.
Registration Windows

• Complete all your registration requirements during your organization’s Window each year.

*Trainings completed outside of your registration window only apply to PREVIOUS registration window requirements.
Registration & Management

Roster Page

Required:

- Primary Leader
- Secondary Leader
- Treasurer
- Advisor
- Must have a minimum of 5 OSU students
- List all members in roster

Must list first name, last name, lastname.# & email address – enter carefully!

- May list other officer positions
- Add new or delete old members
- Must approve all returning members each year
- If you have co-Presidents, both must complete President Training for both to have login access
Registration & Management
Constitution Requirements

- Purpose Statement
- Member selection and removal processes
- Non-discrimination policy
- Officer selection and removal processes
- Officer titles and duties
Registration & Management
Goals Page

• Describe a minimum of 2 goals for the year
• May submit as many goals as you would like
• What is a S.M.A.R.T. goal?

Specific Measurable Attainable Relevant Timely
Registration & Management
Registration Statuses

Inactive → Pending → Active – New/Re-Established → Active – Established

Organizations switch to **Pending** at the start of their Window
### Registration Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inactive</strong></td>
<td>Organizations that have not completed all registration requirements by their registration Window deadline.  <em>Ineligible to use the free resources for student organizations.</em></td>
</tr>
<tr>
<td><strong>Pending</strong></td>
<td>Brand new organizations or organizations in the process of completing registration requirements.</td>
</tr>
<tr>
<td><strong>Active – New/Re-established I or II</strong></td>
<td>All registration requirements completed by the deadline; organizations that have been registered for less than 2 continuous years or have less than 15 members</td>
</tr>
<tr>
<td><strong>Active - Established</strong></td>
<td>All registration requirements completed by the deadline; organizations that have been registered for more than 2 continuous years and have at least 15 members</td>
</tr>
</tbody>
</table>
Status Progression: Representation of end of window

If all requirements are met:

- **Inactive**
  - (or no previous status)
  - • Active New/Re-established I

- **Active New/Re-established I**
  - • Active New/Re-established II

- **Active New/Re-established II**
  - • Active/Established
  - If requirements aren’t met • Active New/Re-established I

- **Active/Established**
  - • Active/Established
  - If requirements aren’t met • Active New/Re-established I
Student Activities and Student Organization Management Site

Log in to the management site:
http://activities.osu.edu/involvement/student_organizations/

*Some information in this video will be discussed afterward

What you will learn in this video:

- Enter and approve organization roster
- Enter goals
- Upload updated constitution
- Enter organization’s general info:
  - purpose statement
  - anti-hazing statement
  - type of organization
  - meeting information
  - registration window selection
Student Activities and Student Organization Management Site
Video Highlights

- Anti-hazing statement: on org info page
- Line of credit listed on org info page
- Previous status on org info page
- Roster: enter dot# carefully, approve all members
- Constitution: ‘click to keep’ to review current, read all sections to ensure all 5 requirements!
Academic Requirements

Minimum GPA Requirements for officers

<table>
<thead>
<tr>
<th>Officer</th>
<th>Minimum GPA Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>2.0</td>
</tr>
<tr>
<td>Graduate</td>
<td>3.0</td>
</tr>
<tr>
<td>Professional</td>
<td>2.0</td>
</tr>
</tbody>
</table>

- Officers must be enrolled in classes full time
- Students may not serve as an officer of more than 3 different student organizations
Academic Requirements

If these requirements are not met:

<table>
<thead>
<tr>
<th>1st semester</th>
<th>An email will be issued as a warning</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd semester</td>
<td>Officer will be asked to find a replacement and step down</td>
</tr>
</tbody>
</table>

You are a student first!

We want your involvement to be a complement to your experience at Ohio State.
Coming Soon

Additional guidance/ recommendations will be made available by spring semester regarding Clery reporting from student organizations about off-campus events and travel. Please be tracking any organization travel to report next year.

Look for these changes next year!
Questions about registration?

Ally Himes (Himes.86@OSU.edu)
Coordinator for Student Organizations

Center for Student Leadership & Service
CSLS@OSU.edu
Treasurer Basics
Student Activity Fee

All students pay a $37.50 activity fee each semester

The fee is allocated to:

- Ohio Union Activities Board: 52%
- D-Tix: 6%
- Student Organizations: 13%
- Student Governments: 13%
- Buck-I-SERV: 8%
- Signature Events: 7%
- Pay It Forward: 1%
To apply for funds

Must be applied for by treasurer

Can be applied for regardless of status

To receive funds

Active Status

No outstanding debt or unpaid bills

EIN*

External bank account

*Your organization’s EIN is your organization’s social security number. This must be applied for through the IRS.
Operating Funds

- Very flexible for use in daily operations
- $200 annually
- Funds issued by check in advance
- Apply between July 1st and April 1st
- Submit receipts and unused funds by May 1st
Operating Expenses

- Advertising Promotion Printing
- National Dues Fees
- Travel and Transportation to retreats and conferences
- Bank Charges Checks
- Membership Awards
- Equipment Costs Facility Rental Fees
- Books Subscriptions
- Office Supplies

Up to $100 on food for recruitment events

*No computer equipment*
Programming Funds

- Eligible for $2000 or $3000 depending on level of active status
- Funds issued on a reimbursement basis
- Can pay departments, the RPAC, and Ohio Union directly
- Must submit receipts within 30 days of your event
- Apply by one of 5 deadlines, depending on event date
Programming Funds

Request deadline based on event date:

<table>
<thead>
<tr>
<th>Event Date</th>
<th>Request Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 16 - October 15</td>
<td>July 1</td>
</tr>
<tr>
<td>October 16 – December 31</td>
<td>September 1</td>
</tr>
<tr>
<td>January 1 – March 15</td>
<td>November 15</td>
</tr>
<tr>
<td>March 16 – May 31</td>
<td>February 1</td>
</tr>
<tr>
<td>June 1 – August 15</td>
<td>April 15</td>
</tr>
</tbody>
</table>

*You may apply for programming funds multiple times per year – apply based on each event date.*
Fundable Programs

1. Educational or Service Activity

2. Open to all students across campus

3. Broadly marketed

4. Held on campus

Ideas: Panel, Workshops, Debates, Speakers, Film Series, Events, more…
Non-Fundable Programs

- Revenue Creation
- Tabling
- Donations
- Banquets
- Political Lobbying
- Recruitment
Reimbursement Categories

**Fully Fundable**
- Reimbursed up to the approved amount
- Speaker fees, venue rentals
- Consumable supplies, speaker travel

**Percent Limited**
- Reimbursed at a percentage of total expenses
  - Food (40%)
  - Apparel (20%)
  - Marketing (20%)
  - Takeaways (20%)
  - Service Travel (50%)
Top Things You Need to Know About Programming Funds

1. $2000 or $3000 annually
2. Issued on a reimbursement basis
3. Some reimbursements are based on a percentage
4. Apply by 1 of 5 deadlines, based on event date
5. Audits due 30 days after event
6. Funds reset on July 1st
Keith B. Key Center for Service and Leadership Resource Room

- Each student organization receives an annual **$250 Line of Credit** to spend on resources.

- Line of Credit **resets to $250** on the last day of your organization’s registration Window OR when your organization is switched to active.

- New organizations will receive a $25 Line of Credit for their first 60 days of Pending status.

- All members listed on an organization’s roster can use the organization’s Line of Credit, unless organization restricts.
Resource Room

• Only three primary officers may reserve and check out equipment

• When your Line of Credit runs out, if your status is Inactive, or whenever you desire, you can purchase items at their cost from the Resource Room

• Individuals can purchase items from the Resource Room
Coke Beverage Donation

Donations are for events, rather than for meetings

The event must be on or near campus

The request must be made at least 2 weeks prior to the event [http://studentlife.osu.edu/coke](http://studentlife.osu.edu/coke)

Not able to serve or distribute non-Coca-Cola products on campus property, nor use university funds to purchase non-Coca-Cola products for events or programs on or off campus.
Fundraising, Sponsorship, Collaboration

• A great way to supplement your budget!

• Your organization is able to raise funds however you’d like to while keeping in mind state and federal laws for exchanging money

• Collaborate with Offices and Departments on campus or other student organizations

• Service Grants – Email Jake Cohen.739 for info
Fundraising

- Organizations may only partner with Barnes and Noble if fundraising with a bookstore

*No spending restrictions on money you fundraise*
Based on university agreements…

Barnes & Noble (fundraising)
Coca-Cola (sponsorship)
Huntington Bank (first right of refusal)
U.S. Bank (for events in the Ohio Union only)
Additional Funding Resources

- ouab.osu.edu
- ipc.osu.edu
- cgs.osu.edu

- usg.osu.edu
Questions about funding?

MacGregor Obergfell (Obergfell.1@OSU.edu)
Fiscal Officer for Student Life

Weekly office hours:
Ohio Union Flag Room
Wednesdays 9:30am-11am
Fridays 2-3:30pm
Resources for Operations
Keith B. Key Center for Student Leadership & Service
Keith B. Key Center for Student Leadership & Service

- Lounge
- Graphics Department
- Video Department
- Meeting Rooms
- Office Space & Lockers
- Leadership Library
Offices & Lockers

- Student organizations have access to office spaces and storage lockers.

- Student organization mail can be addressed to the Ohio Union Resource Room and picked up.
Resources for Student Organizations

Marketing resources

• Graphic designers, videographers, or photographers
• Utilize Resource Room for marketing materials and printing
• Sign up for involvement fairs
• Utilize your operating funds to purchase promotional clothing or other supplies to facilitate organization operation
Day For The K.I.A., Inc.
Awareness/Activism

To provide girls everywhere the opportunity to develop the skills and confidence they need to lead fulfilling lives and become successful le...

1girl
Awareness/Activism

3D Urban Dance Team
Creative and Performing Arts, Ethnic/Cultural, Special Interest, Sports and Recreation

Our organization will provide a creative outlet for aspiring dancers. Our organization also strives to expose our members as well as our aud...
Technology Resources

- Website hosting – sign up through registration on ‘Org Info’ page
- Organization email listservs are managed by OCIO.
- Organization email addresses (myorgname@osu.edu) are also managed by OCIO.
  - Only your advisor can fill out the online request form for these resources
Resources for Student Organizations

Marketing resources

- Submit a request for BEN or Ohio Union Credenza to network with other students
- Advertise your event by placing advertisements on Ohio Union digital screens
- Add your event to the Ohio Union events calendar by emailing your event details
- Submit an advertisement (one paragraph) to the Student Organization Insider Newsletter by emailing CSLS@OSU.edu
Resources for Student Organizations

Member Recruitment and Retention

• Create a plan for team building
• Develop committees with responsibilities
• Create a mentor system between newer and returning members
• Create a mailing list to communicate with organization members
Resources for Student Organizations

Leadership Resources

• Plan a leadership retreat – utilize Student Leadership Advocates to help!

• Apply for an Ohio State University leadership retreat at no cost to you
  LeaderShape, Leadership Week

• Consider participating in a service activity through the Ohio Union’s Keith B. Key Center for Student Leadership and Service
Events and Room Reservations

Utilize the Ohio Union events staff to assist you in the planning and reservations process

- Meeting & Event Space
- Ohio Union Catering
- Tabling in the Great Hall
- Outdoor space

*Cancellation fees may apply! You could be charged if you do not give proper notice before cancelling

*Limited number of rooms at discount

EMS/ Classroom Space Reservations virtual scheduling —
Open Dates
May 15 – Fall    September 15 – Spring    Jan 15 - Summer
Resources

Utilize our website!

**Using University Trademarks**

**Traffic and Transportation Management** Student organization and travel

**Swank**: Purchase rights to show movies at your event

**UniPrint**: Printing large posters or signs on campus

**Archives**: help to make your organization a part of Ohio State’s history

**Hazing and alternatives to hazing**

**Alcohol Policy**

**Diversity & Inclusion**

**Suicide Prevention**

**Sexual violence education and support**

**Activities and Programs with Minor Participants Policy**
Utilize our website:
http://activities.osu.edu/involvement/student_organizations/resources/
BuckeyeLand!

• Get in groups of about 5 – come up to the front to get materials

• Introduce yourself. Read game directions. Be sure cards are in order.

• Go through the cards in order and discuss the items with your team.
BuckeyeLand!

• When you’re finished, return cards in order!

• We have a few more slides to get through.

• If you have questions for me, come ask!

• Double check – did you sign the sign in sheet?
Roadmap for Success
What’s next?

1. Review video and enter information into management system
2. Review resources on website
3. Focus on member recruitment, development, and retention
4. Prepare a plan for officer transitions
Student Organization Staff

**Ally Himes** - Coordinator of Involvement & Student Organizations
Himes.86@osu.edu

**MacGregor Obergfell** – Business Development Coordinator
Student Organization Funding
Obergfell.1@osu.edu

**General Student Organization Questions**–
CSLS@OSU.edu
Wrap-Up

For future reference
- Email with links and presentation slides
- Roadmap for Success

Before you leave
- Sign the sign-in sheet!
- Stop by the Resource Room