STUDENT ORGANIZATION
OFFICER TRAINING
--- for Treasurers ---

THE OHIO STATE UNIVERSITY
OFFICE OF STUDENT LIFE
STUDENT ACTIVITIES
Introduce yourself to your neighbor

- Name
- Organization
- Standing/Year
- Major/Program
- Fun Fact
Goals for Today’s Session

- Connect with fellow treasurers
- Access leadership resources
- Ask questions, share ideas
Expectations for Today’s Session

- Sign in
- Ask questions
- Slides will be emailed
- Use your handout

Participate!
ONLINE TRAINING

Key Roles

Funding and Finances

Registration Basics

Resources
Online Training Key Points

1. What are the **two sources of funding** available from CSA?
2. When are **audits due** for those funding sources?
3. What can student orgs access in the **Resource Room**?
4. What is the **deadline** to complete your registration requirements?
Student Org Guidelines

• Guiding principles
• Registration process
• Responsibilities of student orgs
• Funding guidelines
• Allowable expenses for Operating and Programming Funds
• Much more!
Student Organization
SUCCESS FRAMEWORK

Member Development
Leadership Capacity and Confidence | Social Perspective Taking | Wellness

Organization Operations
Purpose and Goals | Membership Recruitment and Retention
Budgeting and Financial Management | Fundraising and Philanthropy
Programming | Leadership Transitions | Self-Governance
Operational Efficiency | Collaboration | Responsiveness and Innovation
Diversity and Inclusion | Risk Reduction | Advisor Partnerships

Community Engagement
Connection to Student Organizations | Affinity with the University
Commitment to Social Change
Student Organization Coaches

Coaches can help your student organization

- Solve problems and connect with resources
- Set goals using the Success Framework
- Collaborate with fellow leaders
- Get support for member recruitment, leadership transitions, budgets and more
Member Development

Leadership Capacity and Confidence, Social Perspective Taking, Wellness
Leadership Capacity and Confidence

The development of members’ self-awareness of their personal values and skills, as well as their belief that they will be successful when engaging in leadership behaviors.
Leadership Capacity and Confidence

Greatest strengths

Areas for growth

How will your strengths help you succeed as a leader?

How will your role help you grow as a leader?
Resources

- Student Leadership Advocates Workshops
- MCC Education and Training Programs
- Student Organization Success Coaches
- Leadership Education Needs Assessment (LENA)
Organization Operations

Purpose and Goals, Membership Recruitment and Retention, Budgeting and Financial Management, Fundraising and Philanthropy, Programming, Leadership Transitions, Self-Governance, Operational Efficiency, Collaboration, Responsiveness and Innovation, Diversity and Inclusion, Risk Reduction, Advisor Partnerships
Budget and Financial Management

The ability to be financially self-supporting with a well-developed budget that reflects the current and future priorities of the organization
Eligibility for CSA Funding

1. Obtain EIN from IRS
   - Check out activities.osu.edu for step-by-step instructions

2. Complete AP Compliance form
   - Form can be found on the Student Activities website

3. Open organization checking account
   - You may use any bank you prefer

4. Apply for funds
   - Only the treasurer can apply for CSA funds

You may apply for funds regardless of your organization status – Active, Pending, Inactive
Operating Funds

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

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

Up to $100 on food for recruitment events
Programming Funds

For use only with eligible programs

Eligible for $2000 or $3000 depending on level of active status

Apply by one of 5 deadlines, depending on program date

Funds issued on a reimbursement basis

Submit audit and receipts within 30 days of your event
Programming Expenses

- Food, Beverages (40%)
- Publicity (20%)
- Take-Aways (20%)
- Apparel (20%)
- Service Travel (50%)
- Equipment Rental, Consumable Supplies
- Ohio State Facilities
- Personnel

Speaker Costs, Entertainment
Programming Funds

Eligible programs must be:

- Educational or service activity
- Held on-campus
- Open to all fee-paying students
- Broadly marketed
Programming Funds

Ineligible programs include:

• Meals
• Organization recruitment
• Meetings
• Academic program requirement
• Religious or worship services
• Political or lobbying activities
• Tabling
## Programming Funds Deadlines

<table>
<thead>
<tr>
<th>Apply by...</th>
<th>Program Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1</td>
<td>August 16 - October 15</td>
</tr>
<tr>
<td>September 1</td>
<td>October 16 - December 31</td>
</tr>
<tr>
<td>November 1</td>
<td>January 1 - March 15</td>
</tr>
<tr>
<td>February 1</td>
<td>March 16 - May 31</td>
</tr>
<tr>
<td>April 15</td>
<td>June 1 - August 15</td>
</tr>
</tbody>
</table>
You are currently logged in as the General Member for Ski and Board Club at OSU.

Use the following management pages to update information about your student organization, view your training history and sign up for new trainings, check on past funding requests and submit new applications.

Contact the Center for Student Leadership and Service with any questions or assistance in using the features of this management site.

Choose Different Organization/Find Leader

To change groups, please click on your position for the group below.

Brutus Buckeye Fan Club - Primary Leader

- View Org Information
- General Info
- Leaders & Roster
- Constitution
- Goals
- Space Request Form
Operating, Programming, or Another Source?
Your organization is buying team shirts for your executive board. What should you utilize?
Operating Funds
Your organization is planning an annual dance performance in the U.S. Bank Conference Theater, and needs A/V assistance for the production. What should you utilize?
Programming Funds
Your organization is bringing a famous speaker to campus, and he/she has agreed to have a private dinner with the members of your organization. Which should you utilize?
Another Funding Source
Fundraising and Philanthropy

The utilization of creative and effective practices to raise funds for the organization, as well as skills for purposeful charitable giving
Fundraising Ideas

- Alumni Base
- Sell t-shirts
- Campus Parc
- Food/Bake sales
- Restaurant nights
- Schottenstein Center Cleanups

*No spending restrictions on money you fundraise*
Fundraising and Philanthropy

1. What are examples of successful fundraising your organization has tried?

2. What are some challenges your organization has experienced when it comes to fundraising?

3. Does your organization engage in philanthropy? If so, what type of philanthropy work do you do?
Operational Efficiency

The procedures and processes for regular, efficient, and effective organizational function
Submitting an Audit

For Operating and Programming Funds
Audit forms can be found on Student Activities website

Original, itemized, legible receipts
Must show proof-of-payment and exactly what was purchased

Submit to Resource Room
It’s okay if actual expenses vary from the original application
# 2018-2019 CSA Allocations

## Programming Funds Audit Form

Due to the Center for Student Leadership and Service (Room 2095) in the Ohio Union, attn: Angela Britton within 30 days of the scheduled program date. Do NOT return audits to the Information Center or Administrative Office. This form must be completed by the treasurer. If you are the program planner, please consult with the treasurer to ensure accuracy.

**Full Student Organization Name:**

**Title of Program:**

**Date of Program:**

**Location of Program:**

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**Program Income (if any):**

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**Income**

Did you have outside income for this event (i.e., admission fee, sponsors, university department contribution, other student organizations etc.)? **Circle One:** YES or NO. If so, please list all sources of income below and attach all supporting documents to the audit.

<table>
<thead>
<tr>
<th>Source(s)</th>
<th>Net Amount for organization</th>
<th>Audited Amt. (Office only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex: Vemo/Paypal/Undergraduate Student Government</td>
<td>Ex: $300</td>
<td></td>
</tr>
</tbody>
</table>

---

**Program Expenses + Receipts**

<table>
<thead>
<tr>
<th>Category</th>
<th>Vendor(s)</th>
<th>Amount Spent</th>
<th>Explanation</th>
<th>Audited Amt. [Office Only]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex: Entertainment</td>
<td>Ex: Southwest, Mr. Brutus</td>
<td>Ex: $390, $200</td>
<td>Ex: Speaker Flight, Speaker Fee (waived)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>staples</td>
<td>$45.87</td>
<td>Printer cartridge, nametags</td>
<td></td>
</tr>
</tbody>
</table>

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37
But…

Acceptable Receipt

Each item purchased is listed separately and lists each unit price along with total.

But… P*ps* products not a fundable item!

Only Coca-Cola products will be reimbursed!
Acceptable!

You may need multiple documents to show itemization and proof of payment.
<table>
<thead>
<tr>
<th>Charges</th>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>4/21/2011</td>
<td>$15.00 per wireless mic. rented 2 mics</td>
<td>$30.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payroll</th>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>4/21/2011</td>
<td>Invoice paid by: $30.00, receipt: 1-55946958 -- usage fee</td>
<td>$30.00</td>
</tr>
</tbody>
</table>

Terms

Amount Due: $0.00

Acceptable!
Payment received in the amount of $3000.

Robyn
April 1, 2011
robyn@robynods.com
This (or bank statement) shows the funds have cleared your account.

From the bank account, not a photocopy of the check.

Proof of Payment: Cancelled Check
Itemized, shows amount, does not show proof of payment
Not Acceptable

**Illegible** – this org waited too long to turn in their audit
Ohio Union Event Services  
2008 Ohio Union  
1739 North High Street  
Columbus OH 43210  
Phone 614-292-5200 / Fax 614-292-1816

<table>
<thead>
<tr>
<th>Client</th>
<th>Invoice Number: 773801</th>
</tr>
</thead>
</table>
| Edward Greenblatt  
8th Floor Improv Comedy Group  
109 Morrison Tower  
CAMPUS | |

<table>
<thead>
<tr>
<th>Bookings / Details</th>
</tr>
</thead>
</table>

Users of the Ohio Union for event purposes must submit full payment of fees no later than (30) days from the receiving of the event invoice.

Changes or disputes to the invoice can be made within seven (7) days of receipt.

The Ohio Union appreciates your feedback and has created an online feedback:
http://ohiouion.osu.edu/plan_an_event/contact/event_services_eventsfeedback/

Thank you!

**Friday, April 01, 2011**

6:00 PM - 11:30 PM Bellwether Improv Festival (Confirmed) U.S. Bank Conference Theater

<table>
<thead>
<tr>
<th>Reserved: 5:30 PM - 12:00 AM</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Charge:</td>
<td>1</td>
</tr>
<tr>
<td>Less 50% Discount</td>
<td></td>
</tr>
<tr>
<td>Ohio Union Equipment:</td>
<td>1</td>
</tr>
<tr>
<td>A/V Equipment:</td>
<td></td>
</tr>
<tr>
<td>6:00 PM - 11:30 PM Standard</td>
<td></td>
</tr>
<tr>
<td>Microphone - Wireless - US Bank Conference Theater</td>
<td>1</td>
</tr>
<tr>
<td>Less 50% Discount</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>500.00</td>
<td>500.00</td>
</tr>
<tr>
<td>-250.00</td>
<td></td>
</tr>
<tr>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>-37.50</td>
<td></td>
</tr>
<tr>
<td>150.00</td>
<td>150.00</td>
</tr>
</tbody>
</table>
Top Five Things to Know About Completing an Audit

1. Receipts must be original, itemized, legible, and show proof of payment
2. Multiple receipt documents may be required
3. Audit forms found online:
   Student Activities > Student Organizations > Funding
4. Operating and Programming Funds audits have different due dates
5. Submit audits to, and pick up checks from, the Resource Room
KBK Center, Resource Room

$250 line-of-credit

Variety of resources, supplies, games, equipment, etc.
Risk Reduction

The assessment and reduction of accidental harm or loss through proactive safety measures and response plans
Risk Reduction

- Keep expenditures up-to-date
- Mail, audits, and bank statements
- Who’s on record?
- Cash handling
- Transition bank account and EIN
Resources

- Office Hours
- Coca-Cola Product Donation
- OUAB, Student Governments, and other campus collaborators
- Your bank
Upcoming Events and Deadlines
Registration and Funding Deadlines

Autumn Registration Window: October 30
Programming Funds: September 1
• For events taking place October 16-December 31

Programming Funds: November 1
• For events taking place January 1-March 15
Fireside Chats

Every other Monday at 5:30 p.m.
Sept. 9, 23   Oct. 7, 21   Nov. 4, 18
KBK Center, second floor Ohio Union

• Informal discussions, open to any members or leaders
• Topics based on Framework outcomes
• Connect with fellow leaders, student org staff, Coaches, and university resources
Advisor Breakfast

September 11 at 8-9:30 a.m.
Ohio Union

• Advisors should RSVP on the “Advisors” webpage
  activities.osu.edu/involvement/student_organizations/advisors

• May invite up to 2 students
• Come when you can, leave when you must
OUAB Collaboration

Applications for Spring due Friday, September 27

ouab.osu.edu (Plan an Event with OUAB)

- Visit the website for:
  - Application and scoring categories
  - Guidelines
  - FAQs
  - Contact info for student chair and advisor
KBK Center Open House

October 22 at 5-7 p.m.
KBK Center Lounge, Ohio Union second floor

- All student organizations welcome, no RSVP necessary
- Get to know KBK office tenants, student org staff and coaches, Resource Room services
Questions and Follow-up
Final Thoughts

What was most useful for you?

• Framework and Coaches?
• Your own strengths?
• Applying for Operating and Programming funds?
• Fundraising?
• Audits and receipts?
• Campus resources?
Resource Webpage

STUDENT ACTIVITIES

Resources

Events | Funding | Fundraising | Marketing | Student Organization Success Framework | Registration | Risk Reduction | Technology | Training | Travel | Successful Leadership | Additional Resources

Registration

Student Organization Management System Tutorial Videos

For Presidents
For Advisors (spring 2018)
How to Apply for Operating Funds (spring 2017)
How to Apply for Programming Funds (spring 2017)

Other Registration Resources

Student Organization Guidelines (05/01/2018)
Sample Constitution
Advisor Indemnification Letter Template (docx)

(Go to top)
Next Steps

- Complete Online Training (if not done already)
- Check out website ([activities.osu.edu](activities.osu.edu))
- Review the Framework
- Connect with, or request, a Coach
Thank You for Attending

Before You Leave:

Sign attendance sheet

Following Today’s Training:

Confirmation email with links/ resources
Access resources at activities.osu.edu

Contact Us:

csls@osu.edu