STUDENT ORGANIZATION
OFFICER TRAINING
for Presidents

THE OHIO STATE UNIVERSITY
OFFICE OF STUDENT LIFE
STUDENT ACTIVITIES
This online module should take between 20-30 minutes to complete and provides important information about policies, procedures, and resources that apply to your role as a student organization president. This is a complement to in-person training. Some topics will be introduced here that are followed up on in-person. Some topics will be only covered in this module and some topics will only be covered in-person.

To have a successful experience, we recommend that you:

• Take notes! There is a handout on the Resources Page called “Online Module Notes and Questions” that you are welcome to use to organize your thoughts
• Write down questions as they arise, and pay attention to if they are answered later in the module
• Try to apply specific ideas and resources to experiences you have had or anticipate having in your role
• Stay checked-in as best as possible

You will have the opportunity throughout this module to submit any questions or feedback you have about sections of the module. We encourage you submit any other questions you have to CSLS@osu.edu

Thank you for your engagement, and happy training!
In this online module, we will cover

- Key roles in your organization, including your role as treasurer, the role of the president, and of the advisor
- Basics of student organization annual registration
- Student organization funding, including managing budgets, incomes, and expenses
- Resources available to you as a student leader

There were be more material, and different topics, covered in the in-person training
The following section will consider the roles and responsibilities of key positions within your organization, and there is no better place to start than with you!

The president is a key position in your organization. When thinking about the structure of your organization, we like to think of the president as the CEO of the organization, or the key visionary leader of your organization. Your leadership responsibilities include:

• Setting goals and a vision for the organization
• Effectively representing the organization to the community
• Building future leaders
• Providing motivation and support

In addition to these leadership responsibilities, you also have management responsibilities, including:

• Running and often scheduling any leadership team or general body meetings
• Communicating with the organization members, leaders, and advisors
• Completing most of the annual registration requirements

You are also responsible for submitting the vast majority of the annual registration required materials. We will cover information both in this online module and in-person about completing those requirements.
There is a lot expected of you as a president, and you will also gain valuable experience from serving your organization in this role. Some benefits that you can gain through this position are:

- A deeply understanding of how to direct and manage teams of diverse people
- Communication skills
- Experience working in a team
- Tangible experiences that you can discuss on your resume and in interviews as you pursue your next steps
- Great friends and connections
- And hopefully some fun!
One of your best allies in your position should be the organization’s treasurer. Here are the key responsibilities of treasurers in their role.

When thinking about the structure of your organization, the treasurer is the CFO, or key financial leader, of the organization. Their financial leadership responsibilities include:

- Setting a financial vision for the organization
- Keeping records of incomes and expenses for long-term financial security
- Being aware of elements of financial wellness and using those elements to lead the organization in effective use of organization income and expenses

In addition to leadership responsibilities, they also have management responsibilities – particularly managing your organization’s income and expenses. They are responsible for:

- Applying for funding (in fact the only member of the organization who can apply for CSA funds)
- Building and maintaining a budget
- Approving and monitoring spending of the organization
- Leading fundraising efforts
- Collecting dues

The vision you set as president for the organization and the financial vision that the treasurer sets for the organization should work in tandem. In order to ensure that you all are working together efficiently and effectively, the next section will details ways we suggest building that working relationship into a strong and mutually beneficial one.
Organization needs and leader relationships vary greatly, but the relationship between president and treasurer is key. Below are three strategies that, in general, should result in a stronger relationship that benefits officers and the organization.

1. **Establish expectations** of each other early. All officers should do this, but particularly the president and treasurer. Spend time at the beginning of your terms establishing what you expect, what you need, and what you hope from each other and from your relationship. Don’t let the conversation stop there either – *hold each other accountable* to those standards you set and check in to make sure things are working throughout the year.

2. That expectation conversation should set clear and open practices for **communication**. It is important to establish:
   - How will officers communicate with each other (text, email, GroupMe, at exec meetings, etc.)
   - How will officers communicate with the organization
   - How do you all prefer to communicate in terms of questions and updates – do you want lots of little updates as they come up, or one larger update on a weekly or biweekly basis?
   - How will you provide feedback to each other and to other officers (written, verbal, etc.)

3. Finally it is important you the organization leadership, particularly you to, **meet regularly**. Standing meetings that may benefit an organization include
   - One on one meetings with the president and different officers
   - Executive board or leadership team meetings
   - General body meetings
   - Meetings with emerging leaders
   - Meetings with the advisor

Since the advisor also plays a key role in the organization, the next section will detail their roles.
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Since the advisor also plays a key role in the organization, the next section will detail their roles.
All student organizations are required to have a faculty or A&P staff member to serve as an advisor. Organizations may also have as many co-advisors as are willing to contribute their time. Your advisor is your primary university contact point. Advisors have specific requirements of their roles, and there is a wide range of ways in which they engage with organizations beyond those requirements. Your organization can negotiate with your advisor to determine what they can offer.

Advisors are required to:

• Complete an advisor training session once every two years.
• Review and Approve the organization's online registration information each year, thereby also agreeing to serve as the advisor for another year.
• Review and Approve the organization's Goals.
• Review and Approve/Deny the organization's CSA funding requests.
• Review and Approve reservations of space or equipment, as requested by the University department granting the reservation.

In addition to these requirements, the advisor may serve myriad roles with the organization including:

• Attend and support meetings and programming
• Support annual registration processes including annual goals, budgets, and constitution updates
• Assist with the transition process

Let the organization thrive or decline on its own merits
With such a wide range of engagement and potential roles for the advisor, it is important to revisit the strategies for strong relationship building introduced earlier. Though the strategies are the same, the way those may look in practice are different for advisors and leaders, so please review this information carefully.

1. **Establish expectations** of each other early. Whether your advisor is meeting just with your president or with your whole executive board, it is important that expectations are set about what the organization will be sharing with them and how they will be participating.

2. That expectation conversation should set clear and open practices for **communication**. It is important to establish:

   - How does the advisor best want to be contacted (work phone, cell phone, text, email, etc.)
   - When is it best to contact the advisor – they are volunteering their time for this role, and may be most responsive during the work day, so make sure to establish that early so you are not sending emails Friday at 8 p.m.
   - Does the advisor want/need to be CC’d on emails, in organization GroupMes, added to a Google Drive, or other things essential to organization function

3. Finally it is important you the organization leadership, particularly you to, **meet regularly**. Once of the most common schedule for meetings between the advisor and leadership is once a semester but this varies across organizations.

However you build this relationship, it is important that you do. Your advisor can be a great resource to the organization, and we hope you are able to build a mutually beneficial relationship with them throughout your experience as a leader.
This concludes the first section of the online training module. The next module will include elements central to your role as treasurer – budget management, income, expenses, CSA funds, and fundraising.
Annual Registration Renewal Requirements

- President:
  - Training
  - Complete online registration

- Treasurer:
  - Training

- Advisor:
  - Training (every 2 years)
  - Approvals: Registration, Goals
All registered student organizations are required annually to complete a registration process that includes both trainings for officers (including you) as well as the submission of online forms in the Student Organization Management System. After everything is submitted, the advisor also needs to approve the Registration and Goals.

The training required are:

- Annually the President must complete both the in-person and online training sessions
- Annually the Treasurer must complete both the in-person and online training sessions
- The Advisor must complete training every year, and have the option every other time to complete an online re-certification rather than in-person training

The online forms required are

- General Information
- Leaders and Roster
- Constitution
- Annual Goals (2)

Annual registration happens in one of two registration windows

- The Spring Window runs **February 15 – April 30**
- The Autumn Window runs **August 15 – October 30**

At the beginning of your organization’s window, your status will be moved to Pending. Organizations must complete all annual registration requirements within their registration window to return to Active status. If they are unable to complete requirements within their window, the organization will be made Inactive until they complete the missing registration requirements. At that time, they will return to Active – New/Re-Established I. If any organization remains Inactive for two years they are moved to Archive status.

Brand new organizations receive 60 days from when they register on the Student Organization Management System to complete their registration requirements or the end of the window – whichever gives them more time.

More information about registration can also be found online on the Registration page of the Student Activities website.
A large portion of your responsibility during the registration window, in addition to completing this online training module and in-person President training is, submitting the online forms on the behalf of your organization in the Student Organization Management System. If you are new to using the Student Organization Management System, please watch this video that highlights the steps of submitting information in the Management System. It can also be found on the Resources Page

**General Information**
Certain general information needs to be updated annual, including the Anti-Hazing statement. When updating the General Information, ensure the purpose statement, contact information, meeting time, dues information, and whatever else listed is up to date and accurate.

**Leader and Roster Information**
All student organizations are required to have at least 5 OSU student members listed on their roster, including a Primary Leader, Secondary Leader, Treasurer, and Advisor. The roster must be approved every year but clicking the check box next to names on the roster and clicking approve. Please take the time to make any necessary additions or removals to the roster.

**Constitution**
You are required to submit a Constitution every year for your organization. The Constitution is the governing document of your organization and should be complete and up to date. There are five required sections of each constitution:
1. Organization Name and Purpose Statement
2. Non-Discrimination Policy
3. Officer Titles and Duties
4. Method of Selection/Removal for Officers
5. Method of Selection/Removal for Members
You also have the option to “Click to Keep” the Constitution submitted the previous year if there are no updates to the Constitution. Please take advantage of this opportunity to annually review and update your Organization’s constitution. It is your organization’s governing document, and it should support your organization function and you in your president responsibilities. For a sample constitution, please visit the Resource page of the Student Activities website.

The final online form are the two annual goals required from all registered organization.
Registration Requirements

Goals

- Describe a minimum of 2 goals for the year
- May submit as many goals as you would like
- Consider using the S.M.A.R.T. goal model
- Share goals with your organization membership

Specific | Measurable | Attainable | Relevant | Timely
Annual Goals

Goal setting is crucial to an organization’s development and success. Please take time to write these goals with as many of the organization’s leaders and members as possible. This is also a great activity to engage your organization advisor.

Please use the SMART goal model when writing your annual goals. The SMART model ensures your goal will be tangible and that you will be set up for more success in actually completing it. If you are looking for additional support in writing SMART goals, please download the SMART Goals Worksheet available on the Resource page on the Student Activities website.

If you are looking for inspiration in writing goals that are meaningful for your organization’s growth, we recommend starting with the Student Organization Success Framework, discussed later in this module and available online.

You are encouraged, whenever possible, to delegate some of the work of those annual registration responsibilities and be working with your organization or leadership team as much as possible throughout your registration window. Good sections to delegate or share responsibility include:

- Updates to your organization constitution
- Writing the two annual goals
Organizations are not required to complete the registration process in order to gather and function as an organization. However, organizations do receive certain benefits for completing the annual registration process and maintain Active status:

- Your organization is recognized by the university as an Active organization
- Your organization is more easily searchable in the Student Organization Directory
- Access to reserve spaces on campus at discounted rates
- Ability to receive CSA funds
- Organizations must continually renew their registration in order to progress to Active – Established status and be eligible for a higher level of programming funds

Access to participate in the Spring and Fall Student Involvement Fairs or the Mini-Involvement Fairs
During the registration windows, organization presidents are encouraged to submit information about off-campus programming in compliance with the Campus Clery Act. The Clery Act is a piece of legislation tied to the university’s federal Title IV funding, which requires Ohio State to report on crime statistics.

Student organizations are asked to submit information about off-campus programs and meetings where they have an “exclusive control of the space,” including dates and addresses.

“Exclusive control of the space” is usually determined by when an organization has paid money to rent or reserve a space or if they have signed any form of form or informal contract to have the space in the name of that organization. For example:

- If an organization were to travel to a conference, you wouldn’t need to submit the conference, but you would need to submit that you stayed overnight in a hotel
- If a group of members happened to go out to a restaurant after a meeting, you wouldn’t need to submit that. If the organization reserved a large table or back room in the name of the organization, then you would need to submit that information.

Clery reporting is **not** a registration requirement. Choosing not to complete it will not hinder the organization’s ability to be Active. However, the president is asked to submit this information along with all of the required online forms in the Student Organization Management System.
This concludes the introduction to the annual organization registration requirements. More will be covered about this at the in person training, but we will now moving into thinking about the organization’s finances and what you and your treasurer might collaborate on in strengthening the organization’s wellbeing.
When it comes to the financial wellbeing of your organization, your treasurer and CFO should be the primary leader in budget management, setting fiscal goals, fundraising ideas, applying for CSA funds, etc.

However, as mentioned in the Roles section of this module, their financial vision for the organization should match your vision, and so you will need to work in tandem on the financial wellness of the organization. This next section will cover basic information about funding for your student organization. Treasurers are trained in greater depth about the information covered in this section; please connect with them about what they learn in their training.
Funding for student organizations comes from the Student Activity Fee, which began in Autumn 2003. All undergraduate, graduate, and professional students on the Columbus campus pay a $37.50 per semester fee, which generates approximately $4 Million annually.

The fee revenue is allocated according to the following approximate percentages:

- 52% Ohio Union Activities Board (campus-wide programming)
- 13% D-tix Discount Ticket Program
- 13% Student Organization Funding
- 8% Student Government Funding
- 7% Buck-I-SERV alternative breaks program
- 6% Signature Campus Events
- 1% Pay-It-Forward

Funding for registered student organizations is available through the Council of Student Affairs (CSA). Only the treasurer may submit CSA funding applications online. Funds can be applied for regardless of registration status (Active, Inactive, Pending), but organizations must be Active at the time of receiving the funds.

In order to receive funds, a student organization must:

- Have an EIN (for more information about how to acquire an EIN, please visit our funding website)
- Have an AP Compliance form on file with the university (which can be found here)
- Have a bank account
- Be in good financial standing

There are two distinct types of CSA funds that organizations can apply for: Operating Funds and Programming Funds.
One section of CSA funds available to organizations are Operating Funds.  

**What?** Organizations are eligible for up to **$200 each fiscal year** in Operating Funds, which are designed to cover day to day operations costs such as membership dues to a national organization, bank costs, supplies related to the club purpose, and up to $100 in food for recruitment events.

**Who?** Only the organization treasurer can apply for Operating Funds on the behalf of the organization.

**How?** Funding applications are submitted online through the Student Organization Management System. As a part of the application, you will need to submit budget information for how the funds will be used. Once approved, the organization will receive a check which must then be deposited in the organization’s checking account.

**When?** Applications are accepting on a rolling basis anytime between July 1 and April 1 and funds are allocated in advance. Once the organization has spent the money, *the treasurer must complete and submit an audit by May 1* to account for the money. Any unspent portion of the Operating Funds must be returned at the time of the audit.

**What else should I know?** It is vitally important for the organization to **save the receipts** for purchases made with CSA funds. Receipts must be itemized, original, and legible.

Examples of fundable expenses with Operating Funds include:

- office supplies
- promotional materials
- t-shirts
- dues to national organizations
- travel or lodging expenses for a retreat, conference, or educational field trip

A full list of fundable and non-fundable expenses is listed in the [Student Organization Guidelines](#).
In addition to operating funds, organizations are able to apply for a second type of CSA funds: Programming Funds

**What?** All student organizations may apply for programming funds for eligible programs, or those that occur on campus and are open for any Ohio State student to attend. Hands-on volunteer community service or outreach activities that occur off-campus can also be funded.

- **New & Re-Established** status organizations may apply for up to $2,000 per year for their programs.
- **Established** status organizations may apply for up to $3,000 per year for their programs. This amount can be requested in one lump sum, or spread out over multiple programs throughout the year. Student organizations are also permitted to collaborate on programs and combine funds to support a larger budget event.

**Who?** Only the organization treasurer can apply for Programming Funds on the behalf of the organization.

**How?** Funding applications are submitted online through the Student Organization Management System. As a part of the application, you will need to submit budget information for how the funds will be used. The applications are reviewed by the CSA Allocations Committee, which uses viewpoint neutral criteria to evaluate the applications. If approved, the funds are disbursed to the student organization after the program, upon submission of an audit and receipts.
When? There are five strict deadlines by which you must apply for programming funds:

- **July 1:** events occurring August 16 - October 15
- **September 1:** events occurring October 16 - December 31
- **November 15:** events occurring January 1 - March 15
- **February 1:** events occurring March 16 - May 31
- **April 15:** events occurring June 1 - August 15

Unlike Operating Funds, programming funds are issued on a reimbursement basis after audits and receipts are submitted and reviewed. Audits and receipts must be submitted within 30 days of the program.

**What else should I know?** It is vitally important for the organization to save the receipts for purchases made with CSA funds. Receipts must be itemized, original, and legible.

There are two categories for reimbursement:

- Fully fundable line items, or items that can be reimbursed up to the approved amount
- Percent-limited categories

Examples of fundable expenses with Programming Funds include:

- Speaker costs
- Ohio State facility rentals
- Apparel (up to 20% of total program budget)
- Food and beverages (up to 40% of total program budget)

A full list of fundable and non-fundable expenses is listed in the Student Organization Guidelines.
Student organizations are expected to be financial self-sustaining and CSA funds are only a piece of the puzzle.

Fundraising is a key skill for any member of the organization. As the leader of the organization, your members may look to you to develop plans around fundraising, both for specific programs, as well as for the organization more generally.

The following pages will detail some considerations and best practices for fundraising.
Fundraising Ideas

- Dues
- Sell t-shirts
- Campus Parc
- Concession stands
- Restaurant nights
- Schottenstein Center cleanups

*No spending restrictions on money you fundraise*
Here, you see some common ideas for fundraising opportunities. Beyond the university agreement restrictions discussed below, we recommend you to stretch your imagination when it comes to fundraising ideas.

Seek funding through OUAB Collaboration, Student Governments (USG, CGS, IPC), and other grant and sponsorship opportunities within the university.

Many of the restaurants near campus are happy to collaborate on fundraisers. Dues are also a form of fundraising, and are likely the most utilized fundraising technique by student organizations at Ohio State.

Please note: many off campus fundraising opportunities will ask for your tax exempt organization information. Unless your organization has applied for 501(c)3 status with the IRS, you do not automatically have this status, and you should communicate with businesses as such.

Because of university agreements, student organizations:

- May not conduct a fundraiser with a bookstore, except Barnes and Noble
- May not seek sponsorship from any competitor of Coca-Cola
- May seek bank sponsorship, only if Huntington has been offered first right of refusal
- May seek bank sponsorship for events in the Ohio Union, only if both Huntington and US Bank have been offered first right of refusal

We will talk more about fundraising in the in-person training. Please also check out the fundraising packet available in the fundraising section of the Resources page of the Student Activities website.
This concludes the funding and financial management portion of this online module. Please connect with your treasurer to discuss this information and learn more about what they were trained on. Now we will move into the final section of content for this online module.
This module covers many of your responsibilities, and more will be discussed at in-person training. It is important to know that you don’t have to do it alone! In addition to your fellow organization members, leaders, and advisor(s), you have many resources available to you as a student organization.

The first is the student organization staff. We are the front line of support available to make sure you get the answers and support that you need to succeed as Treasurer.
Student Organization Staff

Anna Fredendall – Coordinator for Student Involvement
Registration and Training
Fredendall.7@osu.edu

Johnnie Jordan – Coordinator for the KBK Center for Student Leadership & Service
Resource Room & Center spaces
Jordan.597@osu.edu

Lindsay Marx – Business Development Coordinator
Student Organization Funding
Marx.78@osu.edu

Jen Pelletier – Associate Director for Leadership, Service, and Student Organizations
Pelletier.17@osu.edu
The Keith B. Key Center for Student Leadership and Service is an incredible resource available to all students and student organizations. Located on the second floor of the Ohio Union, student organizations can use the Keith B. Key Center open lounge, reserve meeting room space, and apply annually for locker or office space in the Center. The Keith B. Key Center is also the home of the Resource Room.

**Resource Room**

Each student organization receives an annual $250 Line of Credit to spend on resources (new organizations receive $25 for their first 60 days of Pending status). This line of credit can be used to purchase a variety of resources, including printing, poster board, buttons, balloons, and other resources student organizations might need. In addition, student organizations can reserve popcorn and sno-cone machines through the Resource Room.

For more information about what the Keith B. Key Center can offer, please watch this video.
Keith B. Key Center for Student Leadership and Service
Student Organization Success Framework

Launched in autumn 2017, the Student Organization Success Framework is intended to help student organizations pursue excellence by strengthening individual members, managing organization operations and contributing to our larger community.

The Framework identifies **Individual, organizations and community** outcomes where any organization can develop.

Using a self-assessment tool, organizations can identify where they want to grow, then use the Framework to connect with resources across campus. Use of the Framework is not required, but highly encouraged for organizations who want to improve themselves. Organizations who choose to use the Framework may find they are better prepared to recruit and retain members, engage in collaborations, effectively transition leadership as well as be eligible to apply for **Leadership Awards** or other recognition opportunities.

More information about the Framework and the Self-Assessment can be found on the Student Organization Success Framework page of the Student Activities website.
There are a variety of marketing resources available to Student Organizations.

**Student Life Marketing**

Among the most frequently utilized resources are the services of our Graphic Design staff. Full-time graphic designers and a team of student interns are available to help your organization create logos, flyers, advertisements, t-shirts, booklets, posters, invitations, and more.

The process begins by submitting a request online at [https://studentlife.osu.edu/secure/marketing/](https://studentlife.osu.edu/secure/marketing/). The design work is free for Active student organizations, but the cost of producing the items that have been designed are the responsibility of the student organization. Because of the popularity of this service, your organization will definitely need to schedule the work in advance.

Organizations may also request assistance in finding vendors or promotional items, as well as submit requests for photographers or videographers to document organization events using the same marketing request form at [https://studentlife.osu.edu/secure/marketing/](https://studentlife.osu.edu/secure/marketing/).

Organizations may also advertise their events on the Ohio Union virtual bulletin boards or on the Ohio Union website calendar by contacting Student Life Marketing staff at OUscreens@osu.edu.
**Student Organization Insider**

On Wednesday of each week, all officers and advisors of registered organizations receive the *Student Organization Insider*, an e-mail newsletter used to communicate important information about funding and registration deadlines, upcoming programs, and other announcements that are of interest to student organizations.

Because the *Student Organization Insider* has a distribution of over 4,000 recipients, many organizations also find it valuable to utilize the section of the weekly e-mail reserved for organization announcements. Use this message as an additional means of advertising your events or opportunities for collaboration and recruiting new members. Submit announcements by Tuesday at 12 p.m. through the online [Student Organization Insider announcement submission form](#).
Programs and event planning is a major element of many student organizations. As the president, you are responsible for supporting events, so it is also important you know some of the event planning resources available.

**Ohio Union Events and Buckeye Events Network (BEN)**

Student organizations wishing to hold events or meetings on campus may reserve spaces in the Ohio Union, select classroom building, and select outdoor locations. As a registered organization, you are eligible for a discounted reservation rate. For many meeting and classroom spaces, there is no charge for student organizations.

To reserve a space in the Ohio Union or select classroom spaces, please contact Ohio Union Events at 614-292-5200, at ohiounionevents@osu.edu, or by visiting the Ohio Union Events website.

The first day to submit requests in the Ohio Union for student organization recurring meetings is as follows:

**For Summer Term:** January 15

**For Fall Semester:** May 15

**For Spring Semester:** September 15

To reserve an outdoor space, such as the South Oval or Wexner Plaza, please contact the Buckeye Event Network (BEN) at www.ben.osu.edu.

It is crucial for student organizations to use university resources responsibly. This includes communicating with university departments, following university policies (i.e., no outside catering in the Ohio Union), and paying all bills in a timely manner.
Coca-Cola Beverage Donation Program

Student organizations can request Coca-Cola product to have at their on-campus program free of charge. Applications must be submitted through the online submission form at least 15 days in advance.

Other Venue Rentals

There are also a variety of other university facilities that you can also reserve for your space that aren’t reserved through Ohio Union Events. For spaces like the Library, RPAC, Faculty Club, and Wexner Center, please make sure to follow the policies set by those locations.
Pictured here, please visit the Resources page on the Student Activities website to review the resources listed in this section of the module as well as many others.
Thank you for completing your online portion of president training!
Please remember that you must complete both the online and in-person training modules to complete your treasurer training registration requirement.

After Completing this module:
Register for an in-person training session on the [Training page on the Student Activities website](https://studentactivities.osu.edu/training).

Please review the questions you still have about the information covered in this online module.

If your question does not require immediate attention, and/or if you think the answer could benefit other treasurers, then make sure to ask it at in-person training.

If your question needs to be answered immediately, or if you have already attended in-person training, please email [csls@osu.edu](mailto:csls@osu.edu) and we will address your question as quickly as we can.

Review the Student Organization section of the [Student Activities website](https://studentactivities.osu.edu). Pay particular attention to the Funding Page, Student Organization Success Framework page, and [Resources page on the Student Activities Website](https://studentactivities.osu.edu/resources).