STUDENT ORGANIZATION
OFFICER TRAINING
for Presidents

THE OHIO STATE UNIVERSITY
OFFICE OF STUDENT LIFE
STUDENT ACTIVITIES

Welcome to the online portion of annual President Training

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.

Welcome to the online portion of annual President Training

(continued)

To have a successful experience, we recommend that you:

- Take notes using a handout on the Resources Page called “Online Module Notes and Questions” to organize your thoughts and capture important resources
- 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

Welcome to the online portion of annual President Training

(continued)

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!

Training Overview

In this online module, we will cover

- **Key roles** in your organization, including your role as president, the role of the treasurer, and of the advisor
- Basics of student organization annual **registration**
- **Resources** available to you as a student leader

During the in-person training, we will refer to these topics but focus more generally on your role as a leader and related resources.

Role of the President

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

Role of the President

(continued)

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 advisor
- Completing most of the annual registration requirements

We will cover information about registration requirements both in this online module and in-person training.

Role of the President

(continued)

Much is 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:

- Deep understanding of how to direct and manage teams of diverse people
- Leadership skills that you can discuss on your resume and in interviews as you pursue your next steps
- Great friends and connections
- And hopefully some fun!

Role of the Treasurer

One of your best allies 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 accurate records for long-term financial security
- Demonstrating financial wellness practices, including the ethical spending of funds

Role of the Treasurer

(continued)

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
- Building and maintaining a budget
- Approving and monitoring spending of the organization
- Leading fundraising efforts
- Collecting dues

Role of the Treasurer

(continued)

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 identify ways we suggest building that working relationship into a strong and mutually beneficial one.

Setting Expectations with the Treasurer

Organizational 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.

Setting Expectations with the Treasurer

(continued)

1. **Establish shared expectations -** 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. Revisit and hold each other accountable to those standards you set to make sure things are working throughout the year.

Setting Expectations with the Treasurer

(continued)

2. 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.)

Setting Expectations with the Treasurer

(continued)

3. Make plans 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

Role of the Advisor

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 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.

Role of the Advisor

(continued)

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, if and when they are submitted.
- Review and Approve reservations of space or equipment, as requested by the University department granting the reservation.

Role of the Advisor

(continued)

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

- Attend executive officer meetings
- Attend organization programs and activities
- Meet individually with the organization president on a regular basis
- Review and interpret university policies
- Take a role in formulating the organization's goals
- Offer advice and historical perspective or context to a discussion

Role of the Advisor

(continued)

- Help the organization leaders prepare an annual budget
- Review the organization's finances with the treasurer
- Review and edit all official correspondence before it is sent
- Require a carbon copy of all correspondence
- Take an active role in the transition of responsibilities between old and new officers
- Assist with the planning of retreats or leadership skills workshops

Role of the Advisor

(continued)

- Support program planning processes (make recommendations for topics, connect with university resources, assist with program evaluation)
- Objectively mediate interpersonal conflicts that arise between members
- Ensure the organization's members receive relevant announcements from the university

Setting Expectations with the Advisor

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.

Setting Expectations with the Advisor

(continued)

1. **Establish shared expectations**. 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.

Setting Expectations with the Advisor

(continued)

2. 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 may be more responsive during their work-day, or they may be open to calls 24/7?
- Does the advisor want/need to be copied on emails, in organization GroupMes, added to a file-sharing drive, or other things essential to organization function?

Setting Expectations with the Advisor

(continued)

3. Plan to **meet regularly**. It's common for advisors to meet at least once per semester with organization leaders, but this varies across organizations.

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.

Registration Requirements

All registered student organizations must renew their registration annually by completing training, online updates, and online approvals.

The **training requirements** are:

- President must complete both the in-person and online training sessions annually
- Treasurer must complete both the in-person and online training sessions annually
- Advisor must complete training every two years, and has the option every other time to complete an online re-certification rather than in-person training

Registration Requirements

(continued)

The **online updates required** are:

- General information
- Leaders and roster
- Constitution
- Annual goals (2)

The **online approvals required** are:

- Advisor approval of registration
- Advisor approval of goals

Registration Requirements

(continued)

Annual registration happens in one of two registration windows:

The Spring Window runs **February 1 – April 15**

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 achieve Active status. If your organization does not complete requirements within the window, the organization will be made Inactive until the missing requirements are fulfilled.

Registration Requirements

(continued)

Brand new organizations have 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 on the Student Organizations Registration webpage.

President

Training (online & in-person)

Complete Online Registration

Treasurer

Training (online & in-person)

Advisor

Training

(every 2 years)

Approvals:

Registration and Goals

Online Registration Requirements

The Online Updates are submitted in the Student Organization Management System (activities.osu.edu/secure/studentorgs).

If you are new to using the Student Organization Management System, please watch this video that highlights the Management System features used by Presidents. This video can also be found on the Student Organizations Resources webpage.

Online Registration Requirements

(continued)

General Information

This information is what appears in the online student organization directory and includes details like purpose statement, meeting date/time, membership process, and more.

Leader and Roster Information

All student organizations are required to have at least five student members listed on their roster, including a Primary Leader, Secondary Leader, Treasurer, and Advisor. The roster must be updated and approved annually.

Online Registration Requirements

(continued)

Constitution

The constitution is the governing document of your organization. It's recommended to review this document annually. Your current constitution is kept on-file. If you've made not updates, simply "click to keep" the current version.

There are five required sections of each constitution:

- Organization Name and Purpose Statement
- Non-Discrimination Policy
- Officer Titles and Duties
- Method of Selection/Removal for Officers
- Method of Selection/Removal for Members

For a sample constitution, please visit the Student Organization Resources webpage.

Online Registration Requirements
(continued)

Goals

A minimum of two goals must be submitted.

You have the option to align your goals with Student Organization Success Framework outcomes. More information about the Framework is available online. In addition, trained student coaches can consult with you to develop your goals.

Setting Effective Goals

Goal setting is crucial to an organization's development and success. It's recommended to involve the organization's leaders and members when setting goals. This is also a great activity to engage your organization advisor.

Use the SMART goals model when writing your annual goals. This model will set up your organization for success by including specific, measurable, attainable, relevant, and time-oriented elements. For additional support in writing SMART goals, please download the SMART Goals Worksheet available on the Student Organizations Resource webpage.

Resources and Benefits of Registration

By completing the annual registration process, registered and active student organizations are eligible for the following benefits and resources:

- Listing in the online Student Organization Directory
- Access to reserve spaces on campus at discounted rates
- Ability to apply for and receive funding through the Council on Student Affairs - Operating and Programming Funds
- Access to $250 line-of-credit in the Resource Room

Resources and Benefits of Registration

(continued)

- Opportunity to apply to participate in the Spring and Fall Student Involvement Fairs
- Opportunity to apply for office or locker space in the Keith B. Key Center for Student Leadership and Services
- Access to free marketing and graphics support
- Access to free website hosting, email listserv, email account

Clery Act Reporting

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 universities to collect and report crime statistics.

Clery Act Reporting

(continued)

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 rented/reserved a space or if they have signed any type contract to have the space in the name of that organization.

Clery Act Reporting

(continued)

For example:

- If an organization were to travel to a conference, you wouldn’t need to report the conference, but you would need to report 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 report that. However if the organization reserved a banquet room at that restaurant, then you would need to report that information.

Clery Act Reporting

(continued)

Clery reporting is **not** a registration requirement. Choosing not to complete it will not hinder the organization's ability to be Active. However we ask that you submit this information along with all of the required online forms in the Student Organization Management System.

Student Organization Funding

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, applying for CSA funds, and more.

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 together for 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 your treasurer about what they learn in their training.

Student Organization Funding

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 the fee each semester, which generates approximately $4 Million annually.

Student Organization Funding

(continued)

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

Student Organization Funding

(continued)

Funding for 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 in order to receive funds.

Student Organization Funding

(continued)

In order to receive funds, a student organization must:

- Have an EIN (for more information about how to acquire an EIN, please visit the Student Organizations Funding webpage)
- Have an AP Compliance form on file with the university (this form can be found on the Student Organizations Funding webpage)
- Have a bank account
- Be in good financial standing

Operating Funds

What? All organizations are eligible for up to **$200 annually** in Operating Funds, which are designed to cover day-to-day operational expenses.

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

Operating Funds

(continued)

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, your organization will be issued a check so the funds may be spent up-front.

When? Applications are accepting on a rolling basis anytime between July 1 and April 1. 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.

Operating Funds

(continued)

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

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.

Programming Funds

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

New & Re-Established status organizations may apply for up to **$2,000 annually** for their programs.

Established status organizations may apply for up to **$3,000 annually** for their programs.

Programming Funds

(continued)

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 may apply for Programming Funds on the behalf of the organization.

Programming Funds

(continued)

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 as a reimbursement after the program, upon submission of an audit and receipts.

Programming Funds

(continued)

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 1: 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.*

Programming Funds

(continued)

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

There are two categories for reimbursement:

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

Programming Funds

(continued)

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.

Fundraising

Student organizations are expected to be **financially self-sustaining** and CSA funds are only one possible funding source.

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

Fundraising

(continued)

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 host fundraisers. Dues are also a form of fundraising, and are likely the most utilized fundraising technique by student organizations at Ohio State.

Fundraising

(continued)

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 and sponsors as such.

Fundraising

(continued)

Due to 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

Please check out the fundraising packet available in the fundraising section of the Resources page of the Student Activities website.

Additional Resources

This module covers many of your responsibilities, and more will be discussed at the 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, you have many resources available to you as a student organization.

The first is the student organizations staff. We are the front-line of support available to make sure you get the answers and support that you need to succeed as President.

Johnnie Jordan
jordan.597@osu.edu
Coordinator, Keith B. Key Center for Student Leadership and Service

Manages the Resource Room and the Keith B. Key Center for Student Leadership and Service, including student organizations with office and locker space.

Brooke Olson
olson.276@osu.edu
Coordinator, Student Involvement and Student Organizations

Manages registration and training, works with new organizations, student organization leaders and advisors.

Angela Britton
britton.190@osu.edu
Business Development Coordinator

Manages the student organization funding process, conducts audits, and assists students with funding questions.

Jen Pelletier
pelletier.17@osu.edu
Associate Director, Student Activities

Oversees student organization team as well as resources related to leadership development and community service.

Keith B. Key Center for Student Leadership and Service

The Keith B. Key Center 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 rooms, and apply annually for locker or office space.

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 in the Resource Room.

This can be used to purchase a variety of resources including printing, poster board, buttons, balloons, and more.

In addition, student organizations can reserve bullhorns, bag-toss games, popcorn machine, and sno-cone machine as well as a variety of board games.

For more information about what the Keith B. Key Center can offer, please watch this video.

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, organization, and community** outcomes where any organization can develop.

Student Organization SUCCESS FRAMEWORK

› INDIVIDUAL:

Consciousness of Self, Leadership Efficacy, Wellness, Social Perspective Taking, Social Change Behavior

› ORGANIZATION:

Purpose and Goals, Membership Recruitment and Retention, Budgeting and Financial Management, Fundraising and Philanthropy, Leadership Transitions, Self-Governance, Operational Efficiency, Collaboration, Responsiveness and Innovation, Awareness of and Comfort with Difference, Advising Partnerships

› COMMUNITY:

Citizenship, Connection to the University, Connection to and Belonging in the Student Organization Community, Risk Reduction

Student Organization Success Framework

(continued)

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.

Student Organization Success Framework

(continued)

Trained Student Org Success Coaches are available to meet and consult with all student organizations. Coaches can help you find solutions to problems, connect with campus resources, and apply the Framework outcomes. Request a meeting with a coach using our online form.

More information about the Framework and the Self-Assessment can be found on the Student Organization Success Framework webpage.

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.

Student Life Marketing

(continued)

The process begins by submitting a request online at 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.

Student Life Marketing

(continued)

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 studentlife.osu.edu/secure/marketing/.

Organizations may also advertise their events on the Ohio Union virtual bulletin boards 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.

Student Organization Insider

(continued)

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

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 buildings, 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.

Ohio Union Events and Buckeye Events Network (BEN)

(continued)

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

Ohio Union Events and Buckeye Events Network (BEN)

(continued)

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

It is crucial for student organizations to use university resources responsibly. This includes communicating with university departments, following university policies, and paying all bills in a timely manner.

Other Venue Rentals

There are a variety of other university facilities that you can also reserve outside of Ohio Union Events including RPAC, North Residential Event Spaces, Frank W. Hale Black Cultural Center, Thompson Library, Faculty Club, and Wexner Center.

Each venue has their own reservation process and policies.

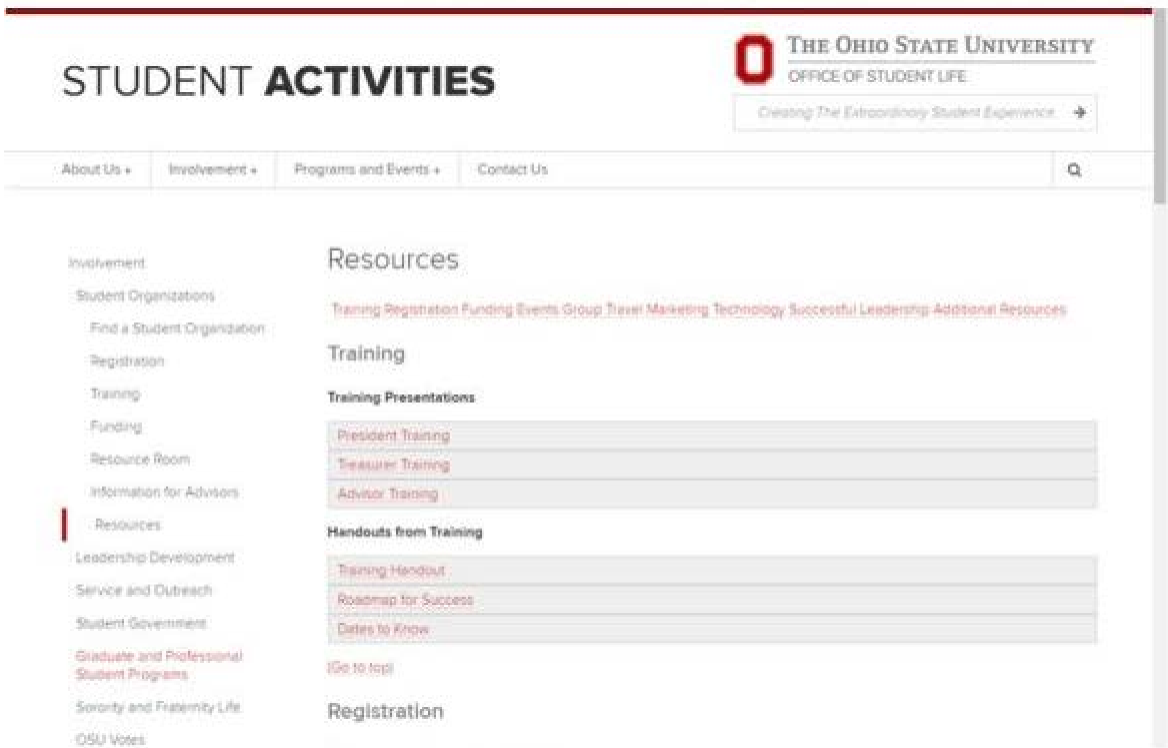
Coca-Cola Beverage Donation Program

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.

Please visit the Student Organization Resources webpage to review a more complete listing of resources and information.

Resources Website



Thank you for completing your online portion of president training

Please remember that you must complete both the online and in-person training modules annually to fulfill your president training registration requirement.

After completing this module:

- Register for an in-person training session on the Student Organizations Training webpage

Thank you for completing your online portion of president training

(continued)

After completing this module:

- 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 presidents, then please 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 and we will address your question as quickly as we can

Review the Student Organizations webpages. Pay particular

Thank you for completing your online portion of president training

(continued)

After completing this module:

- Review the Student Organizations webpages. Pay particular attention to the pages for Registration, Funding, Student Organization Success Framework, and Resources.
- Contact our team at csls@osu.edu with any additional questions or assistance.