# STUDENT ORGANIZATION
# OFFICER TRAINING

## for Treasurers

THE OHIO STATE UNIVERSITY
OFFICE OF STUDENT LIFE

STUDENT ACTIVITIES

# Welcome to the online portion of annual Treasurer 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 treasurer.

This 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 Treasurer 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 Treasurer 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 treasurer, the role of the president, and of the advisor
- Student organization **funding** and audits, including managing budgets, incomes, expenses
- Basics of student organization **annual registration**
- **Resources** available to you as a student leader

These topics will be briefly reviewed during the in-person training, and you will have an opportunity to ask clarifying questions.

# Role of the Treasurer

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!

# Role of the Treasurer

(continued)

The treasurer is a key role in your organization. When thinking about the structure of your organization, we like to think of the treasurer as the CFO, or key financial leader of the organization. Your **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

# Role of the Treasurer

(continued)

In addition to your leadership responsibilities, you also have **management responsibilities** – particularly managing your organization's income and expenses. You are responsible for:

- Applying for funding (in fact you are 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

# Role of the Treasurer

(continued)

Do not lose sight of the fact that you are not just the numbers person, you are a leader in your organization and one that the organization cannot function without.

# Role of the Treasurer

(continued)

There is a lot expected of you as a treasurer, 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 deeper understanding of organization finances and how to manage an organizational budget
- Creative approaches and best practices for fundraising and financial security
- Greater understanding of financial wellness
- Leadership skills

# Role of the Treasurer

(continued)

- 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!

Your job won't always be easy, but it is crucial for your organization. We will talk more in-person about why that is and how to succeed in your position.

# Role of the President

Your best ally in your position should be the organization's president. Here are the **expectations of the president's role**:

- 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)

They 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

# Role of the President

(continued)

The vision the president sets for the organization and the financial vision that you have set for the organization should be aligned.

In order to ensure that you are working together efficiently and effectively, the next section will introduce strategies to build a mutually beneficial working relationship.

# Setting Expectations with the President

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.

# Setting Expectations with the President

(continued)

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

# Setting Expectations with the President

(continued)

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.)?

# Setting Expectations with the President

(continued)

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

# 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.
- 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 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

# 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 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.

# Setting Expectations with the Advisor

(continued)

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 established 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

# Setting Expectations with the Advisor

(continued)

3. Finally, it is important for the organization leaders and the advisor **meet regularly**. A common schedule for meetings between the advisor and leaders 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.

# Budgeting 101

As the primary manager of your organization's income and expenses, it is important to build a well-detailed budget for your organization.

A budget, simply, is a plan for managing your organization's money, including identifying sources of incomes, as well as any expenses the organization will need to spend throughout the year. You should build a budget for your organization's overall finances as well as for individual programs.

# Budgeting 101

(continued)

Making and updating a well-detailed budget is important because:

- As the financial leader, you need to be able to report out on the finances of the organization at any point
- It ensures that the organization has a plan for being financially independent
- You can plan ahead for programs or operations for which you wish to apply for CSA funds (discussed later in this section)
- You can plan ahead for fundraising for the organization
- You can approve spending on the behalf of the organization with confidence

# Budgeting 101

(continued)

Budgets are required for most funding applications, including operating and programming funds applications

On this page are some sample budgets tracking expenditures for operating costs and programming costs. There is also a sample budget available on the Resources webpage of the Student Activities website.

**Operating Expenditures**

| Budget Item | Budgeted Cost | Actual Cost | Variation |
|---|---|---|---|
| Binders | 45 | 30.95 | -14.05 |
| Pens/Pencils | 15 | 16 | 1 |
| Printer Ink | 65 | 70 | 5 |
| New Member Tshirts | 350 | 325.97 | -24.03 |
| Printer Paper | 50 | 60 | 10 |
| National Dues | 3500 | 3500 | 0 |
| National Conference Travel | 1000 | 600 | -400 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| **OVERALL (A)** | 5025 | 4602.92 | 422.08 |

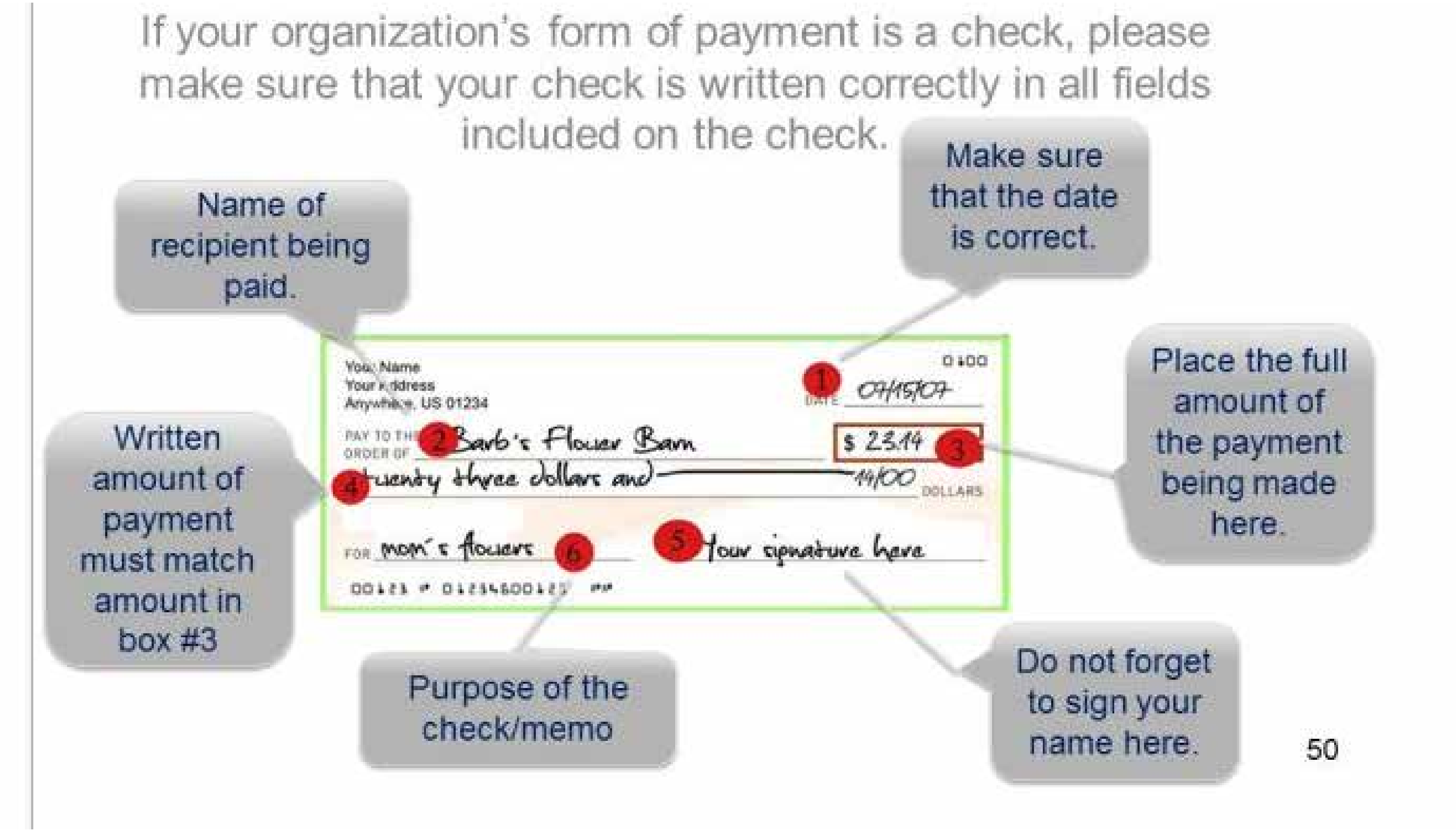
**Programming Expenditures**

| Budget Item | Budgeted Cost | Actual Cost | Variation |
|---|---|---|---|
| Ohio Union Space | 2000 | 2000 | 0 |
| Catering | 500 | 800 | 300 |
| A/V Needs | 300 | 250 | -50 |
| Labor | 167.5 | 167.5 | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| **OVERALL (B)** | 2967.5 | 3217.5 | |

This page also shows a sample budget for income - or all of the sources of funding that makes your org financially self-sustaining

| Income | | | |
|---|---|---|---|
| **Budget Item** | **Budgeted Income** | **Actual Income** | **Variation** |
| Member Dues | 5000 | 5000 | 0 |
| Annual Fundraiser | 2000 | 2500 | 500 |
| Alumni Donations | 500 | 300 | -200 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| | | | 0 |
| **OVERALL (C)** | 7500 | 7800 | |

You will likely be required to be receive and write checks as a part of your role. Here is a resource on how to write a check.



# 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.

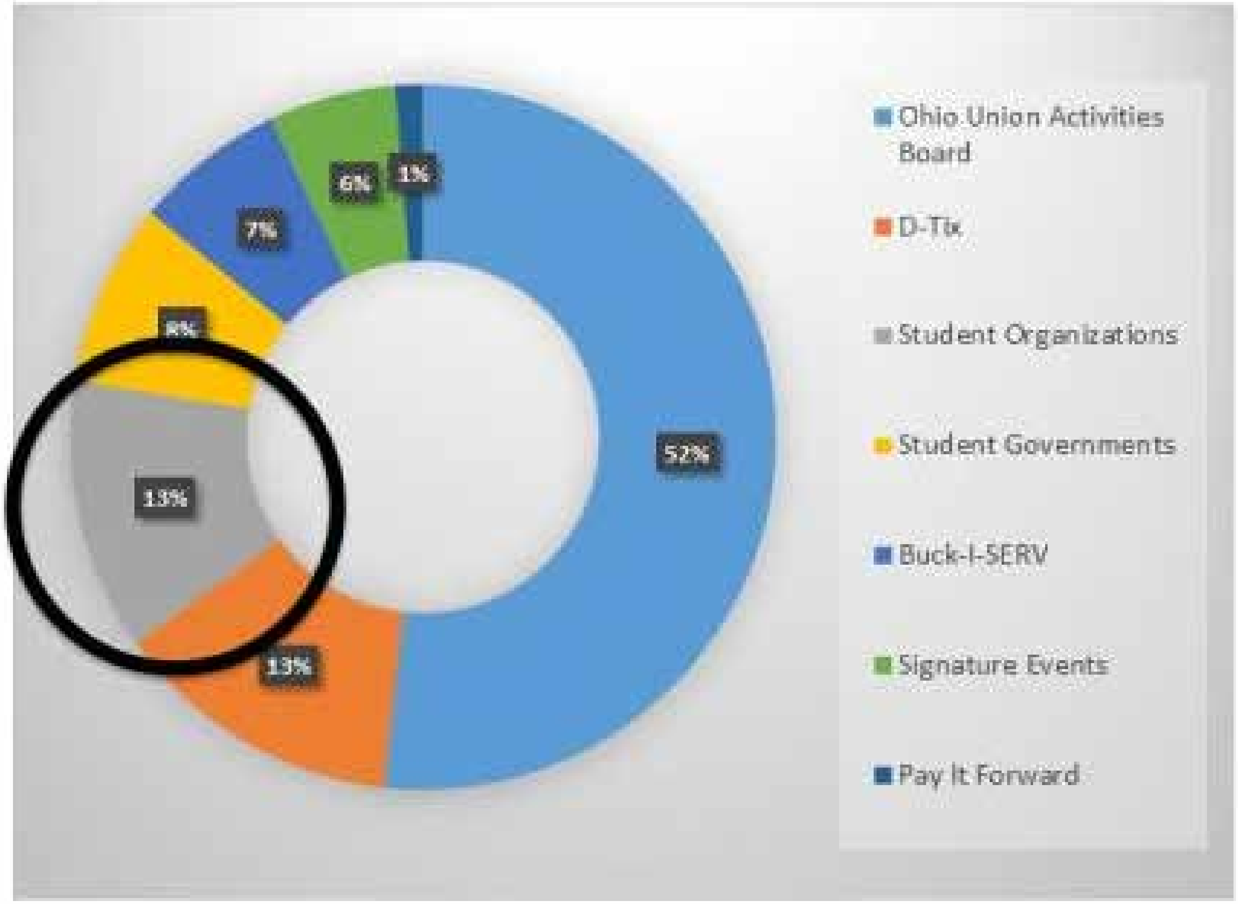
# Student Organization Funding

(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 Activity Fee



# Student Organization Funding

(continued)

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.

# Student Organization Funding

(continued)

In order to receive funds, a student organization must:

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

There are two distinct types of CSA funds that organizations can apply for: Operating Funds and Programming Funds

# Operating Funds

**What?** 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.

**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

# 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

# Operating Funds

(continued)

A full list of fundable and non-fundable expenses is listed in the Student Organization Guidelines. For more information about how to apply, please watch this Operating Funds Video.

# 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 per year** for their programs.

**Established** status organizations may apply for up to **$3,000 per year** 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 can 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. For more information about how to apply for Programming Funds, please view this Programming Funds Video.

# Introduction to Audits

For both Operating Funds and Programming Funds, you must submit an audit form and all itemized, original, and legible receipts from the event.

- Operating Funds audits are due by *May 1*
- Programming Funds audits are due by *30 days after the event*

# Introduction to Audits

(continued)

Audits are important for several reasons. Since CSA funds come from the Student Activity Fee, it is crucial that our organization uses student money effectively and responsibly.

Audits promote ethical spending by organizations, and good budget management practices.

By completing your audit correctly, you are also building your organization's financial documentation which you will be able to pass down through transitions to future treasurers

This is a sample audit for Operating Funds. All audits must include itemized, original, and legible receipts which show proof of payment.

## 2019-2020 CSA Allocations
## Operating Funds Audit Form

| |
|---|
| Received:______ |
| Reviewed:______ |
| Amt. Recd:$______ |
| Amt. Spent: $______ |
| Amt. Retd: $______ |
| E-mail:______ |
| REQ ID:______ |
| **FOR OFFICE USE ONLY** |

Due to the Center for Student Leadership and Service in the Ohio Union, attn: Angela Britton no later than May 1, 2020. Organizations are encouraged to submit this form as soon as spending is complete.
Do NOT return audits to the Information Center or Administrative Office. This form must be completed by the treasurer.

Treasurer Name (Print first name, last name, OSU username.#): ____________

Organization ____________

Treasurer Signature: ____________

*By signing above, I certify the information presented in the audit is accurate and these expenses were not for the financial gain or profit of the organization. I understand any misinformation may jeopardize this organization's funding and result in judicial action.*

Directions

**Follow the example and fill out information for each receipt you are turning in.**
**The receipts must be original and itemized in order to count towards the audit.**
**Please list each receipt separately - do not total receipts within any category.**
**Do not use highlighter on receipts - it will erase the printing and your receipt cannot be audited. Use a pen to make notes.**
**Refer to 2019-2020 Student Organization Guidelines for Fundable/Non-Fundable expenses for these categories.**

| Category | Vendor(s) | Amount | Explanation | Audited Amt. [Office Only] |
|---|---|---|---|---|
| Ex. Office Supplies | Ex. Staples<br>Office Max<br>Dunder Mifflin | Ex. $20<br>$15<br>$120.00 | Ex. Post-its for office<br>Ink cartrige for printer<br>Paper for office printer | |
| **Advertising/Promotion/ Printing** | | | | |
| **Bank Charges/Dues/Legal Fees** | | | | |
| **Books/Subscriptions** | | | | |

# Introduction to Audits

(continued)

Here are examples of strong audits, with notes about what makes them strong. It is important you spend time making your audit form as correct as possible so your organization can receive the funding that they need:

Ohio UNION

Ohio Union Event Services
2008 Ohio Union
1739 North High Street
Columbus OH 43210
Phone 614-292-5200 / Fax 614-292-1816

Please pay directly.

# Acceptable!

Invoice

**Client**

Edward Greenblat
8th Floor Improv Comedy Group
109 Morrison Tower
CAMPUS

**Invoice Number:** 7738OU

Invoice Date: 4/15/
Due Date: 5/20
Event Name: Bel nprov Festival
Reservation No.: 95
Credit Card/100 W I ap CSA funding

| Bookings / Details | | Price | Amount |
|---|---|---|---|

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

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

*The Ohio Union appreciates your feedback and has created an onli feedback: http://ohiounion.osu.edu/plan_an_event/contact/event_services_ev*

*Thank you!*

Ohio Union and RPAC Invoices can be paid directly

**Friday, April 01, 2011**

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

| | | | |
|---|---|---|---|
| Reserved: 5:30 PM - 12:00 AM | | | |
| Room Charge: | 1 | 500.00 | 500.00 |
| Less 50% Discount | | | -250.00 |
| Ohio Union Equipment: | | | |
| A/V Equipment: | | | |
| 6:00 PM - 11:30 PM Standard | | | |
| Microphone - Wireless - US Bank Conference Theater | 1 | 75.00 | 75.00 |
| Less 50% Discount | | | -37.50 |
| Lighting Console - Conference Theater | 1 | 150.00 | 150.00 |

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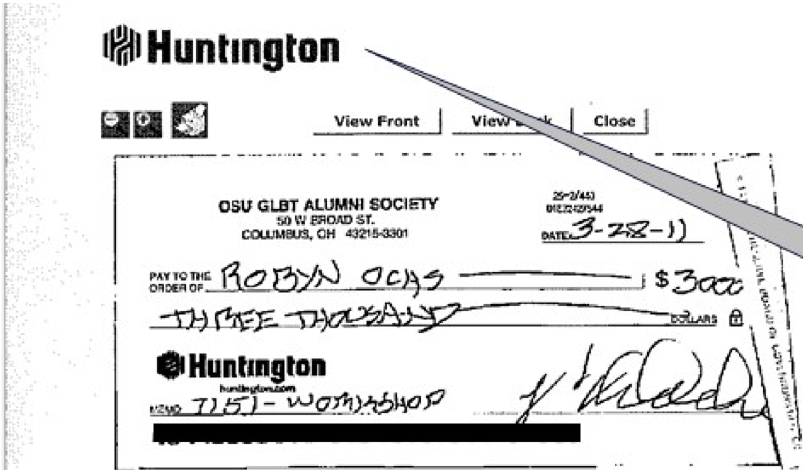
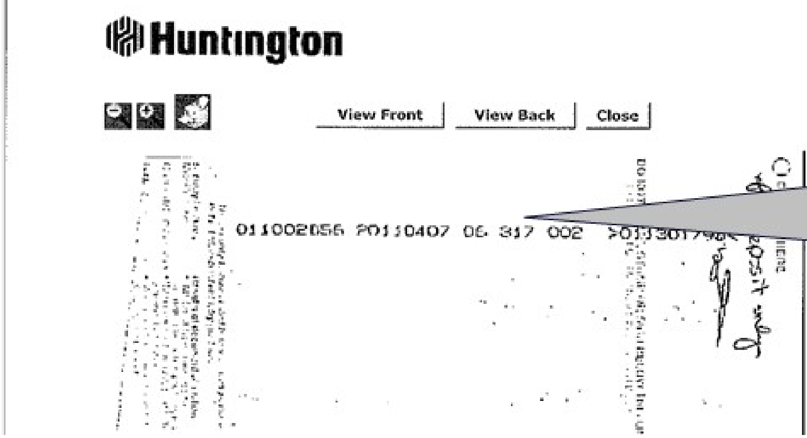
# Proof of Payment: Cancelled Check




From the bank account, not a photocopy of the check




This (or bank statement) shows the funds have cleared your account

# Acceptable!

Thank You For Choosing
Papa John's Pizza
Restaurant #0220

Driver: Dustin J Lasko

Order # : 0027
Order Time : 01:57:38 pm
Out: 05:38:36 pm Elap: 00:14:36

Phone # : (614)291-9317
Customer : Jay
Address :
337 17th Ave W

Sector : B4

Delivery Remarks : Call 61

750SCR - 5-39 14" 1 Top (S

5 <14> 14" Original
+Extra Cheese
7 <14> 14" Original
+Pepperoni
3 <14> 14" Original
+Mushrooms
Delivery Charge

Discount:
Tax:
SubTotal:
Total:

Run Summary

Driver: Dustin J Lasko

Papa John's
Restaurant #0220
33 Hudson st e
Columbus OH 43202
(614) 784-1919
04/25/2009 05:23pm

InStore Order

Name: Jay

114.50
0.00
114.50
114.50
10.00
24.50

0.00

Customer Signature
X

Customer Copy

Thank You For Choosing

## You may need multiple documents to show itemization and proof of payment!

Proof of payment

**WebCheckout Invoice**

Patron
Fatih Olmez

[redacted]

Invoice number
**I-55946958**

Created
8:43 AM, 4/21/2011

Location
Reserve Equipment and Materials (IT Service Desk), 2009 Millikin Rd., Room #025 - Phone 614-292-3131

Charges

| Qty | Date | Description | Amount | Subtotal |
|---|---|---|---|---|
| 1 | 4/21/2011 | $15.00 per wireless mic. rented 2 mics | $30.00 | $30.00 |

Payments

| Qty | Date | Description | Amount | |
|---|---|---|---|---|
| 1 | 4/21/2011 | Invoice paid by: $30.00 , receipt: 1-55946958 -- usage fee | $30.00 | $30.00 |

Terms

Amount Due: $0.00

OSU OCIO IT SERVICE DE
2009 MILLIKIN RD
COLUMBUS, OH 432100000

04/21/2011 08:46:06
Merchant ID: 000000000582844
Terminal ID: 02967484
219006300996

CREDIT CARD
VISA SALE

CARD # XXXXXXXXXXXX7256
INVOICE 0001
Batch #: 000010
Approval Code: 08197B
Entry Method: Swiped
Mode: Online

SALE AMOUNT $30.00

CUSTOMER COPY

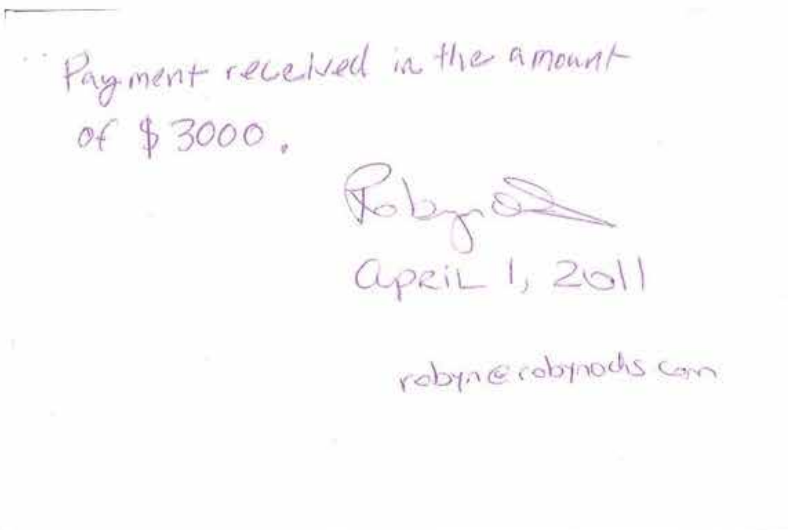
# Acceptable!

# Introduction to Audits

(continued)

Here are examples of audit forms that are not acceptable, and notes as to why:

# Not Acceptable


Payment received in the amount of $3000.
Robyn
April 1, 2011
robyn@robynochs com

usimprints.com
YOUR LOGO ON ANYTHING

1724A General George Patton Dr.
Brentwood, TN 37027
Phone: 866-604-6774
Fax: 866-946-3724

**Sales Order**

| Date | Order # |
| --- | --- |
| 3/31/2011 | 20933 |

| Bill To | Ship To |
| --- | --- |
| Jessica Ly<br>2905 Ontario St.<br>Columbus OH 43224 | Jessica Ly<br>2905 Ontario St.<br>Columbus OH 43224 |

| Terms | Customer PO # | Sales Rep | In Hands Date | Production Level |
| --- | --- | --- | --- | --- |
| Credit Card | 157431online | Meagan Clark | 4/7/2011 | RUSH |

| Item | USI Item # | Description | Qty | Rate | Amount |
| --- | --- | --- | --- | --- | --- |
| Padfolios | 8241255 | Promotional Leather Look 8 1/2" X 11" Portfolio | 25 | 8.44 | 211.00 |
| Customize | | Item Color:Black<br>Imprint/Logo:logo<br>(art will be emailed)<br>Imprint Color:White<br>Imprint Size:3" x 5"<br>Location:front | 1 | 0.00 | 0.00 |
| SetUp Chgs | | Set-Up Charges | 1 | 50.00 | 50.00 |
| Shipping: Shipping | | Estimated Shipping: May result in additional charges (ground) | 1 | 28.00 | 28.00 |

Thank you for your order Ly!

**Total** $289.00

*IMPORTANT NOTES & CONDITIONS*
*- DO NOT PAY FROM THIS SALES ORDER. YOU WILL RECEIVE AN INVOICE.*
*- Please review your sales order confirmation to make sure your order is correct.*
*- Check ship to address, delivery date, imprint information, and all other details.*
*- Production begins AFTER the art proof has been approved. Delays in approval will hold up production time and could result in additional charges.*

# Not Acceptable

Itemized, shows amount, does not show **proof of payment**

# Not Acceptable


**Illegible** – this group waited too long to turn in their audit!

# 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

(continued)

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

Beyond these agreements, your organization should pursue fundraising opportunities that align with your organization purpose, minimize your risk, and have potential to be financially successful.

# Fundraising

(continued)

Beyond the university agreement restrictions, stretch your imagination. Here are some common ideas for fundraising opportunities. Many of the restaurants near campus are usually happy to collaborate. Please note that there is no restriction on dues as a form of fundraising; they are likely the most utilized fundraising technique by student organizations at Ohio State.

# Fundraising

(continued)

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

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 through the IRS, you do not automatically have this status, and you should communicate with businesses as such.

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.

# Fundraising Ideas

- Dues
- Sell t-shirts
- Campus Parc
- Concession stands
- Restaurant nights
- Schottenstein Center cleanups
- *No spending restrictions on money you fundraise*

# Annual Registration Renewal Requirements

| President | Treasurer | Advisor |
| --- | --- | --- |
| Training | Training | Training (every 2 years) |
| Complete online registration | | Approvals: Registration, Goals |

# 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 recertification 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.

# 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 Autumn 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

# Registration Requirements
(continued)

Your president is responsible for submitting most of the registration requirements. However, there are two key responsibilities that you have in the annual registration process:

- Treasurers must complete both the online and in-person treasurer training modules by the deadline
- Assist the president in drafting the annual goals and any necessary updates to the constitution

For any additional questions or clarification about the annual registration process, please visit the Student Organizations Registration webpage.

# Additional Resources

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, 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 Treasurer.

**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 for student organizations, works with new organizations, and advises Student Organization Success Coaches.*

**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 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.

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

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 and Resource Room can offer, please watch this video.

# Student Organization Success Framework

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 **Member Development, Organization Operations, and Community Engagement** outcomes where any organization can develop.

# 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 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 Noon 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 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.

# 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 Rec Sports facilities, North Residential Event Spaces, Frank W. Hale Black Cultural Center, Thompson Library, Faculty Club, and Wexner Center.

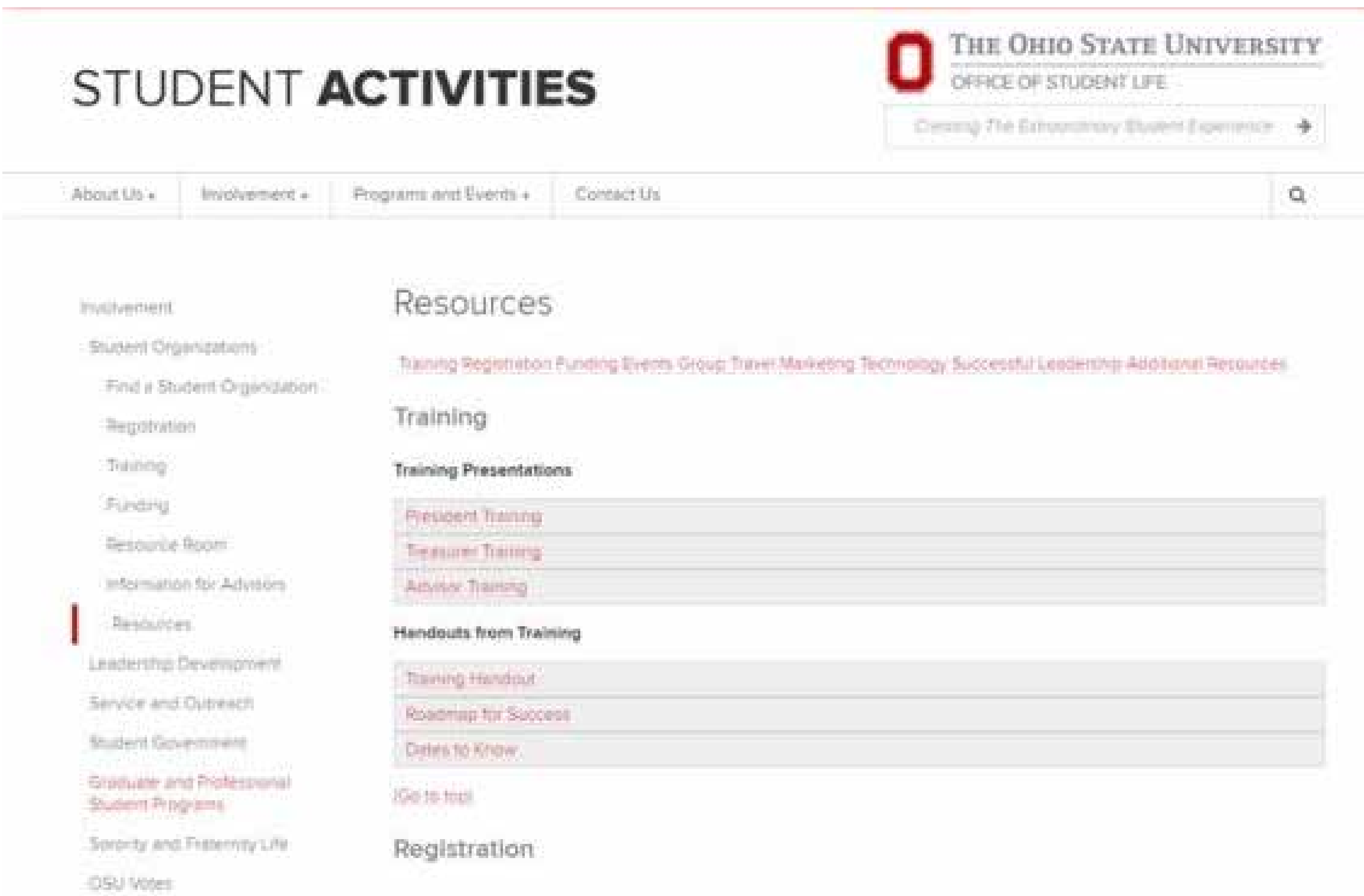
Each venue has their own reservation process and policies.

# 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 22 days in advance (new timeline started in January 2020).

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 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)

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

# Thank you for completing your online portion of president training

(continued)

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.