STUDENT ORGANIZATION
OFFICER TRAINING
for Treasurers

THE OHIO STATE UNIVERSITY
OFFICE OF STUDENT LIFE
STUDENT ACTIVITIES
This online module is intended for student organization treasurers. It should take between 20-30 minutes to complete and provides important information about policies, procedures, and resources for your role.

This a complement to in-person training. Some topics will be introduced here that are also covered 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:

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
This online module will cover four general topics:

- Your role as treasurer
- Overview of managing budgets and basic fiscal processes
- Applying for and auditing CSA Operating and Programming Funds
- Resources available to you as a student organization leader
Your Role as Treasurer

The treasurer is the financial leader for your student organization. This may look different across different organizations based on the purpose, operations, and programs. However, some things are fairly consistent for all organizations.
Your Role as Treasurer

As a leader in your organization, your key responsibilities include:

- Setting a financial vision for the organization
- Acting ethically and spending funds for the benefit of the organization as a whole
Your Role as Treasurer

To achieve this leadership role, your primary tasks include:

• Approving and monitoring spending of the organization
• Maintaining accurate and timely budget and bank records
• Applying for funding from the university and/or non-university sources (if applicable)
• Collecting dues (if applicable)
• Leading fundraising efforts (if applicable)
Treasurer Primary Tasks

Approving and monitoring spending of the organization

- Use an approval process for leaders and members to request organization funds before spending them
- Create an annual budget that lists all sources of income and all expenses
- You might need to have an operations budget (e.g., office supplies, membership dues) that is different from a programming budget (e.g., space reservations, catering, AV)
Treasurer Primary Tasks

Maintaining accurate and timely budget and bank records

- Update the budget on a regular basis, at least monthly
- Share the budget with your president, advisor, and other relevant leaders
- Monitor your bank account at least monthly
- Consider reviewing the bank statement with your advisor
Applying for funding from the university and/or non-university sources (if applicable)

- In some cases, including Operating and Programming Funds, as treasurer you are the only person who has access to submit funding applications
Treasurer Primary Tasks

Collecting dues (if applicable)

- Communicate to members about the cost of dues and timeline for payment (annually or each semester)
- Keep track of who has paid using a basic spreadsheet
Leading fundraising efforts (if applicable)

- Identify funding needs for your organization and seek fundraisers to fulfill those needs
- Provide requested documentation to the fundraising business
Treasurer Required Tasks

Your student organization president will complete most of the annual registration requirements. However, the treasurer and advisor also have tasks that must be completed in order for your organization to achieve Active status.

As part of the annual registration process, you must complete two items during your registration window:

- Complete this online training module
- Complete a live training session
If you serve as treasurer for more than one organization, you only need to complete training once per year.

If you served as treasurer last year, you will need to re-complete training again this year.

You are encouraged to work with your president to set annual goals, which they will submit as part of the annual registration process.
Your strongest partner may be your organization’s President. It is important to develop an effective working relationship with the President as well as with the rest of your organization’s leadership team.
Working with your President

Work with your President to:

• Set a vision and goals for the organization
• Represent your organization on campus
• Build future leaders in your organization
• Motivate and support one another
• Complete annual registration requirements
Take time to set expectations for how you will work with your President. This could include:

- What strengths you can contribute
- What you need from each other to be successful
- How frequently and what methods you will use to communicate
- When and how you will meet
- How you will handle differences of opinion
Your strongest advocate may be your organization’s Advisor. It is important to develop an effective working relationship with your Advisor for the long-term success and sustainability of your organization.
Working with your Advisor

Work with your Advisor to:

• Manage budgets and bank accounts
• Apply for and audit Operating and Programming Funds
• Answer general fiscal questions and solve problems as they arise
• Gain historical perspective on your organization
Working with your Advisor

Take time to set expectations for how you will work with your Advisor. This could include:

• What strengths you bring to your role
• What coaching you need to be successful
• How frequently and what methods you will use to communicate
• When and how you will meet
• How to use this role to build leadership skills for future opportunities
The Student Organization Success Framework is a resource designed to help all student organizations pursue excellence. There are 19 specific outcomes within three broad categories - Member Development, Organization Operations, and Community Engagement. You can use the Framework to identify areas of strengths and opportunity within your organization, and then connect with relevant university resources to take action.
Student Organization Success Framework

In your role as treasurer, you will likely refer to outcomes for Budgeting and Fiscal Management, Fundraising and Philanthropy, Programming, Risk Reduction, and Leadership Capacity and Confidence most frequently. However, any of the outcomes can be applied to your role and your student organization.
Role of the Treasurer Feedback Form

This concludes the first section of the online training module. The next portion will include information about managing budgets and basic fiscal processes.
Managing Budgets

A budget is simply a plan for managing your organization’s funds, including sources of incomes and expenses.

You can build separate budgets for your organization’s operations and programs, or you can build a single budget with multiple sub-sections for types of expenses.

There is no single best budget format. There are many ways to be successful based on the needs of your organization.
A detailed and updated budget is important because:

• It provides an accurate description of the organizations’ finances
• It creates a plan for your organization to be financially self-sufficient
• It allows you to plan ahead for programs or operations
• It allows you to plan ahead for fundraising needs
• Budgets are required for most funding applications, including Operating and Programming Funds
Sample Budgets – Expenditures

Here are two sample budgets – one for Operating Expenditures and one for Programming Expenditures.

### Operating Expenditures

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Budgeted Cost</th>
<th>Actual Cost</th>
<th>Variation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Binders</td>
<td>45</td>
<td>30.95</td>
<td>-14.05</td>
</tr>
<tr>
<td>Pens/ Pencils</td>
<td>15</td>
<td>16</td>
<td>1</td>
</tr>
<tr>
<td>Printer Ink</td>
<td>65</td>
<td>70</td>
<td>5</td>
</tr>
<tr>
<td>New Member T-shirts</td>
<td>350</td>
<td>325.97</td>
<td>-24.03</td>
</tr>
<tr>
<td>Printer Paper</td>
<td>50</td>
<td>60</td>
<td>10</td>
</tr>
<tr>
<td>National Dues</td>
<td>150</td>
<td>150</td>
<td>0</td>
</tr>
<tr>
<td>National Conference Travel</td>
<td>700</td>
<td>600</td>
<td>-100</td>
</tr>
<tr>
<td><strong>OVERALL (A)</strong></td>
<td><strong>1375</strong></td>
<td><strong>1252.92</strong></td>
<td><strong>122.08</strong></td>
</tr>
</tbody>
</table>

### Programming Expenditures

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Budgeted Cost</th>
<th>Actual Cost</th>
<th>Variation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ohio Union Space</td>
<td>2000</td>
<td>2000</td>
<td>0</td>
</tr>
<tr>
<td>Catering</td>
<td>500</td>
<td>800</td>
<td>300</td>
</tr>
<tr>
<td>AV Needs</td>
<td>300</td>
<td>250</td>
<td>-50</td>
</tr>
<tr>
<td>Labor</td>
<td>167.5</td>
<td>167.5</td>
<td>0</td>
</tr>
<tr>
<td><strong>OVERALL (B)</strong></td>
<td><strong>2967.5</strong></td>
<td><strong>3217.5</strong></td>
<td><strong>-250</strong></td>
</tr>
</tbody>
</table>
Both budgets have columns for “Budgeted Cost” (what you expect to spend), “Actual Cost” (what you did spend), and “Variation” (the difference between the two). This allows you to track your plans as well as what really happened.

Both budgets have “Overall” totals at the bottom. This provides a big-picture snapshot of the current state of your budget.
Sample Budgets – Income

Here is a sample budget for Income.

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Budgeted Income</th>
<th>Actual Income</th>
<th>Variation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Dues</td>
<td>5000</td>
<td>5000</td>
<td>0</td>
</tr>
<tr>
<td>Annual Fundraiser</td>
<td>2000</td>
<td>2500</td>
<td>500</td>
</tr>
<tr>
<td>Alumni Donations</td>
<td>500</td>
<td>300</td>
<td>-200</td>
</tr>
<tr>
<td>OVERALL (C)</td>
<td>7500</td>
<td>7800</td>
<td>0</td>
</tr>
</tbody>
</table>
Sample Budgets – Income

This also has columns for “Budgeted Income” (what you expect to take in), “Actual Income” (what you took in), and “Variation” (the difference between the two).

Use the Expenditures and Income budgets together to make sure you have sufficient funding to manage your operations and programming.
Basic Fiscal Processes – EIN

In order to receive university funds and open a bank account, your organization must have an EIN, or Employer Identification Number.

The EIN is issued by the IRS. Similar to an individual's Social Security Number, your organization's EIN identifies it uniquely for a variety of fiscal purposes. Visit the IRS website for additional information about how to apply for and manage your organization's EIN.
Basic Fiscal Processes – EIN

You only need to apply for this once – this is not something you do annually.

Most student organizations register as a “social/savings club” but you should verify that this is the right category for your organization.

You can upload your EIN letter from the IRS in the Student Org Management System, which is helpful for long-term document maintenance.
Basic Fiscal Processes – Bank Accounts

If your organization plans to take in money, you will need a bank account in the name of your student organization. You may choose to use any bank you like. There are no rules or restrictions on which banks student organizations use. Talk with your bank about the account features they offer and choose what is best for your organization.
Basic Fiscal Processes – Bank Accounts

We recommend the treasurer and president are listed on the bank account. You may choose to have other officers, based on their role and need to access funds, listed on the account as well. It is recommended that advisors are not listed on the organization's bank account.
Basic Fiscal Processes – Bank Accounts

To open a new bank account you will need:

• EIN (Employer Identification Number)
• The bank may ask for a copy of your EIN letter, which is issued by the IRS when your EIN is assigned
• Valid identification for anyone who will be listed on the account
Most student organizations do not need to register with the Ohio Secretary of State. If the bank asks you for your registration with the Secretary of State, inform them you need an account that does not require that registration. This will likely be an account for a "community group" rather than a "business."

Review your bank statements at least monthly to check for accuracy and any unusual activity.
Basic Fiscal Processes – Bank Accounts

Make time annually, after leadership transitions, to update the users on your bank account. This needs to be done in-person at your bank. Remove outgoing or graduated leaders and add incoming leaders.
Checks made out to your student organization cannot be deposited into your personal bank account. They must be deposited into your organization’s account. Depositing organization checks in a personal account may cause your personal account to be closed for suspected fraudulent activity.
Basic Fiscal Processes – Writing a Check

You may need to write and receive checks on behalf of your student organization.

Please note, checks made out to your student organization must be deposited in your organization bank account – they cannot be deposited into a personal bank account.
Basic Fiscal Processes – Writing a Check

View the image below for a description of the key fields on a check.
In order to receive funds from the university, student organizations must have a current AP Compliance Form on file. This form allows your organization to be entered in the university's fiscal system as a payable vendor.

The form may be filled out electronically, but must be printed, signed, and submitted. All required fields must be completed. Partially completed forms will not be accepted.
In the General Information section:
• Select “no” for OSU Employee
• Enter your student organization name for “Legal Business Name”

In the Federal Tax Classification section:
• Select the classification that best describes your student organization
• Most student organizations are “C Corporation” however consult your advisor and/or a tax expert as needed
Basic Fiscal Processes – AP Compliance Form

In the Taxpayer Identification Number section:
• Enter your student organization Employer Identification Number (EIN)

In the Certification section:
• Print and sign your name
• Enter the current date
Basic Fiscal Processes – Tax Status

Student organizations are not legal entities of The Ohio State University and may not use the university’s tax-exempt status.

Student organizations are responsible for their own tax-related responsibilities.
Student organizations may apply to be considered a non-profit tax-exempt organization with the IRS. Most student organizations do not need to do this in order to successfully operate. However those organizations who do apply for non-profit status may be subject to additional restrictions and reporting obligations with the IRS.

Please consult with a tax expert for specific questions about the tax status for your student organizations.
This concludes the second section of the online training module. The next portion will include information about CSA Operating and Programming Funds.
The Council on Student Affairs (CSA) is a subcommittee of the University Senate with student, faculty, and staff members. They oversee the student organization registration and funding guidelines, including Operating and Programming Funds for student organizations. This funding comes annually from your Student Activity Fee. All Columbus-campus students pay the Student Activity Fee. Student organizations receive 14% of the fee revenue for these Funds.
CSA Student Organization Funding

Student Activity Fee funds also support these groups and programs:

• Ohio Union Activities Board (OUAB)
• D-Tix
• Student governments
• Buck-I-SERV
• Signature Events
• Pay It Forward
You must submit an online application for CSA funds. Only the treasurer has access to submit applications via the Student Org Management System. You may apply for CSA funds when you have Pending, Active, or Inactive. You may only receive CSA funds if you have Active status.
Applying for CSA Funds

In order to receive funds, your student organization must:

• Have an EIN
• Have a bank account in the name of your organization
• Have an AP Compliance Form on-file with the university
• Be in good financial standing with the university
• Submit a complete application online by the appropriate deadline
Applying for CSA Funds

Please review the instructional videos for applying for Operating Funds and applying for Programming Funds.
All student organizations are eligible to apply for up to $200 each year in Operating Funds, which are designed to cover day-to-day operational needs.

As a part of the application, you will need to submit budget information for how the funds will be used.

Applications are accepting on a rolling basis within two funding windows: July 1-November 1 and November 2-April 1.
Operating Funds

You may apply in one or both funding windows.

Once approved, Operating Funds are allocated up front and an audit is due by December 1 (for July 1-November 1 applications) or May 1 (for November 2-April 1 applications).
Examples of fundable expenses with Operating Funds include:

- Office supplies
- Promotional materials
- Dues to national organizations
- Expenses for a retreat, conference, or educational field trip
- Up to $100 for food as part of recruitment activities

Full details about Operating Funds are available online at [go.osu.edu/StudentOrgFunding](go.osu.edu/StudentOrgFunding) and in the Registration and Funding Guidelines.
Programming Funds

All student organizations are eligible to apply for up to $2,000 or $3,000 each year in Programming Funds, which are designed to support specific programs. As a part of the application, you will need to submit budget information for how the funds will be used.
The amount of Programming Funds your organization is eligible for is based on your Active status. Student organizations that are Active-New/Re-established are eligible for up to $2,000. Student organizations that are Active-Established are eligible for up to $3,000.
Applications are accepting on 5 specific deadlines, based on the date of your program:

• July 1 (for programs August 16-October 15)
• September 1 (for programs October 16-December 31)
• November 1 (for programs January 1-March 15)
• February 1 (for programs March 16-May 31)
• April 15 (for programs June 1-August 15)
You may apply in one, some or all funding windows. You may apply for multiple programs within the same funding window.

Once approved, your organization will receive a check after your program is over based on your program audit. Audits are due within 30 days of your program date.
Programming Funds

Examples of fundable expenses with Programming Funds include:

• Speaker fees
• Ohio State facility rentals
• Consumable supplies
• Marketing, catering, apparel (these categories have limitations on how much may be reimbursed)
For expenses with reimbursement limitations, consider your total program budget to determine what percentage will be reimbursed from Programming Funds. For example, catering may be reimbursed up to 40% of your total program budget. For a program that costs $1,000, you can use Programming Funds to cover up to $400 of your catering expenses. Any catering expenses above that amount must be covered by a different funding source.
Full details about Programming Funds are available online at [go.osu.edu/StudentOrgFunding](go.osu.edu/StudentOrgFunding) and in the Registration and Funding Guidelines.
Audits for CSA Funds

Audits are required for Operating and Programming Funds. This is how you will account for the way you spent the funds. Audits must include:

• Completed audit form (available on Funding webpage)
• Original, itemized, and legible receipts which show proof of payment for all expenses
Audits for CSA Funds

Operating Funds audits are due by December 1 (for applications received between July 1- November 1) and by May 1 (for applications received between November 2-April 1).

Programming Funds audits are due within 30 days of your program date.

If audits are not submitted on time, your organization may forfeit its good financial standing with the university.
Operating Funds Audit Form

Below is a picture of the Operating Funds audit form.

Enter each receipt on a separate line to more easily account for all of your organization's expenses.

Audit forms and receipts should be submitted to the Resource Room, within the KBK Center for Student Leadership and Service (second floor, Ohio Union). They may also be submitted via email to CSAfunding@osu.edu.
Operating Funds Audit Form

2021 - 2021 CSA Allocations
Operating Audit Form
For Fall operating funds the audit is due December 1, for Spring operating funds the audit is due May 1. Audits must be submitted ATTN: Angela Britton to CSAfunding@osu.edu by appropriate deadlines. This form must be completed by the TREASURER.

<table>
<thead>
<tr>
<th>Treasurer Name (First, Last, OSU username):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name:</td>
</tr>
</tbody>
</table>

Directions:
Follow the example and fill out information for each receipt you are turning in. The receipts must be original and dated. In order to count towards the audit, if expenses have items in multiple categories, please mark the appropriate category and in the receipt or two separate lines. In recognition of such as audit form. DO NOT use highlighters or markers. It will cause the printing and your receipt cannot be accepted. Refer to 2020-2021 Student Organization Guidelines for “available/Non-available expenses for the categories.”

<table>
<thead>
<tr>
<th>Category (Select from drop-down)</th>
<th>Vendor</th>
<th>Explanation</th>
<th>Amount Spent</th>
<th>Audited amt. (Office Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Supplies</td>
<td>Staples</td>
<td>Post It Notes</td>
<td>$20</td>
<td></td>
</tr>
</tbody>
</table>

Total Expenses:

Received: _____________________
Reviewed: _____________________
Amt Received: _____________________
Amt Spent: _____________________
Amt Returned: _____________________
Req ID: _____________________
For Office Use Only
Below is a picture of the Programming Funds audit form.

Please note, there are more fields on the Programming Funds audit form than for Operating Funds.

You need to account for income, expenses, and program evaluation.
Programming Funds Audit Form

Audit forms and receipts should be submitted to the Resource Room, within the KBK Center for Student Leadership and Service (second floor, Ohio Union). They may also be submitted via email to CSAfunding@osu.edu.
# Programming Funds Audit Form

**2021-2022 CSA Allocations**

**Programming Audit Form**

Due to via email to CSAfunding@osu.edu Attn: Angela Britton within 30 days of the scheduled program date. This form must be completed by the treasurer. If you are the program planner, please consult with the treasurer to ensure accuracy.

<table>
<thead>
<tr>
<th>Full Student Org. Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Title of Program:</td>
<td></td>
</tr>
<tr>
<td>Date of Program:</td>
<td></td>
</tr>
<tr>
<td>Location of Program:</td>
<td></td>
</tr>
</tbody>
</table>

**Directions:**

Follow the example and fill out information for each receipt you are turning in. The receipts must be original, itemized, and legible in order to count towards the audit. If receipts have items in multiple categories please mark the appropriate category and list the receipt on two separate lines. List receipts in order on audit form. Add rows if necessary. Do not use highlighters on receipts - it will erase the printing and your receipt cannot be audited. Refer to 2020-2021 student organization guidelines for fundable/non-fundable expenses for these categories.

**Income**

Did you have outside income for this event (i.e. admission fee, sponsors, university department contribution, other student organization, etc)?

*Circle One: Yes or No.* If so, please list all sources of income below and attach all supporting documents to the audit.

<table>
<thead>
<tr>
<th>Source</th>
<th>Net Amount</th>
<th>Audited Amount (Office only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex: Venmo / Paypal / USG</td>
<td>Ex: $300</td>
<td></td>
</tr>
</tbody>
</table>

**Expenses**

<table>
<thead>
<tr>
<th>Category (Select from drop down)</th>
<th>Vendor</th>
<th>Explanation</th>
<th>Amount Spent</th>
<th>Amount not be reimbursed</th>
<th>Audited Amount (Office only)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$0</td>
<td></td>
<td>$0</td>
</tr>
</tbody>
</table>
Receipts for Audits

In order to be accepted with your audit form, receipts must be:

• Original
• Itemized
• Legible
• Show proof of payment
Receipts for Audits

You may need to submit multiple receipt documents for a single expense to meet all four criteria.

Do not use highlighter ink on register receipts – this may damage the receipt, making it illegible.
Below are visual examples of acceptable receipts. The receipt on the left is original, itemized, legible, but does not show proof of payment. The receipt on the right is original, legible, shows proof of payment, but is not itemized. Both receipts must be submitted.
Acceptable Receipts for Audits

Invoices, along with a receipt showing proof of payment, are acceptable. Both documents must be submitted.
Acceptable Receipts for Audits

Invoices from university departments, for example Ohio Union, may be submitted with your audit form to be paid directly by CSA.

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Invoices:

- Client: Stacy Smith
- Event Name: VP's Student Reception
- Status: Confirmed
- Phone: 614-292-7393
- Event Type: Meeting
- Event Coordinator: Johnnie Jordan

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Invoice Details:

- Item: Standard for 75
- Quantity: 1
- Price: $250.00
- Amount: $250.00

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Additional Charges:

- University Catering
- 5:30 PM - 6:30 PM Reception - Desserts for 150
- 1:00 PM - 2:00 PM Catering - Desserts for 150
- Event Service - China Service
- Catering Notes
- Fudge Brownies (per dozen)
- Sesquicentennial Cookies - unwrapped (per dozen) (burns 12)
Cancelled checks may be used to show proof of payment, but must also include an itemized invoice.
Below are visual examples of unacceptable receipts.

This item provides an itemized list, but it literally reads: “not an actual receipt.”
Unacceptable Receipts for Audits

Handwritten receipts are not acceptable.

Payment received in the amount of $3000.

April 1, 2011

robyn@robynocks.com
Due to the university’s relationship with Coca-Cola, only Coke products may be purchased with university funds. Non-Coke products, like the ones circled on these receipts, will not be reimbursed.
This concludes the third section of the online training module. The next portion will include information about resources available for student organization treasurers.
CSA Operating and Programming Funds may not cover all of your expenses. Student organizations may seek funding from additional university sources. This may include academic units, student governments, OUAB collaborative event process, and other grant opportunities.
Additional University Funding Sources

Here is a listing of some, but not all, funding options:

• Undergraduate Student Government student organization funding: usg.osu.edu/finances/funding_basics/funding_student_orgs

• Council of Graduate Students funding opportunities: cgs.osu.edu/funding-opportunities/

(continued on next page)
Additional University Funding Sources

• Inter-Professional Council funding for student organizations: ipc.osu.edu/resources/funding/for-student-organizations

• OUAB collaborative events application: ouab.osu.edu/plan-an-event-with-ouab

• Student Activities Member Development Grant: activities.osu.edu/involvement/student.organizations/development/member_engagement_funds
Additional University Funding Sources

Each of these opportunities has a separate application, selection, and audit process. Please work with each unit to learn and follow their process.
Fundraising and Sponsorships

Student organizations are expected to be financially self-sufficient. University funding sources, like CSA Operating and Programming Funds, may not meet all your financial needs. You may need to coordinate fundraisers or seek sponsorships to generate revenue for your organization. Fundraisers and sponsorships should align with your organization’s purpose, minimize your risk, and have the potential to be financially successful.
Fundraising and Sponsorships

You do NOT need to submit an audit to the university for any funds gained through fundraisers, sponsorships, or member dues.
Fundraising and Sponsorships

Please note these limitations:

• You may not seek sponsorship/ fundraisers with competitors of Coca-Cola
• Bookstore fundraisers may only be with Barnes & Noble
• For bank sponsorships, you must seek right-of-refusal from Huntington Bank before approaching other branches
  • If the sponsored program is in the Ohio Union, you must also seek right-of-refusal from US Bank
Fundraising and Sponsorships

Visit the Resources website (go.osu.edu/StudentOrgResources) for additional information
Resource Room Line-of-Credit

All Active student organizations have access to a $250 line-of-credit in the Resource Room. You do not need to apply for this. It becomes available once your organization achieves Active status.
You can use this to pay for copies, poster printing, buttons, balloons, trifold boards, poster board, flip-chart paper, folders, and more. You can also use free resources including butcher paper and paint. You can also check out equipment like popcorn machine, snocone machine, and assorted board games. For a full listing of available resources and hours of operation, visit activities.osu.edu/involvement/student_organizations/kbkcenter/resource_room/
Resource Room Line-of-Credit

Any person listed on the organization roster may spend against the line-of-credit. Only the primary leader, treasurer, and secondary leader may check out equipment.
Student Life Marketing

All student organizations may request free support from Student Life Marketing. You may request up to two projects per semester.
Resources are available for

- Graphic design
- Photography
- Videography
- University brand compliance
- Connecting with local vendors
- Access to university marketing outlets (e.g., digital screens)

Visit studentlife.osu.edu/secure/marketing to submit a request.
Coca-Cola Beverage Donation Program

Due to the university’s relationship with Coca-Cola, student organizations may request free beverages for on-campus programs.

Requests must be submitted at least 22 days in advance of your program date.

Visit studentlife.osu.edu/coke for full details and to submit a request.
Student Organizations Team Resources

For assistance throughout the year, contact our Student Organizations Team.

Contact csls@osu.edu for:

• General questions about your student organization, deadlines, requirements

Contact CSAfunding@osu.edu for:

• Specific questions about funding applications, audits, receipts
Schedule a Coach meeting at go.osu.edu/CoachRequest for:

- General consultation about university resources, making a budget, fundraising ideas
Many additional resources are available online at go.osu.edu/StudentOrgResources.

Use the Student Organization Success Framework menu at the top of the page to find what you’re looking for related to Budgeting and Financial Management, Fundraising and Philanthropy, Programming, or many other topics.

You can also find registration and training resources, including the content of this online module and live/in-person training session materials.
This concludes the final content section of the online training module. Before you finish this module, please complete the wrap-up and feedback forms that follow this slide. Be sure to click all the way to the end of the module. You will receive an email with a copy of any feedback you submitted throughout the module, which will confirm it has been completed.
Thank you for completing your online portion of treasurer training. Click "submit" at the bottom of the page so that this part of your training will be recorded as complete.

Please remember that you must complete both the online module and in-person training session annually to fulfill your treasurer training registration requirement.
After completing this module:

- Register for an in-person training session on the [Training webpage](#)
- 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 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](mailto:csls@osu.edu) and we will address your question directly
Next Steps

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.