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)



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)

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

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

Treasurer Required Tasks

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.

Working with your President

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

Working with your President

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



Working with your Advisor

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

Student Organization Success Framework

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 subsections 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.

Managing Budgets

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			
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 T-shirts	350	325.97	-24.03
Printer Paper	50	60	10
National Dues	150	150	0
National Conference Travel	700	600	-100
			0
			0
			0
			0
			0
OVERALL (A)	1375	1252.92	122.08

Programming Expend	litures		
Budget Item	Budgeted Cost	Actual Cost	Variation
Ohio Union Space	2000	2000	0
Catering	500	800	300
AV Needs	300	250	-50
Labor	167.5	167.5	0
			0
			0
			0
			0
			0
			0
			0
OVERALL (B)	2967.5	3217.5	-250

Sample Budgets – Expenditures

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.

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	

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. <u>Visit the IRS website</u> 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

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.

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.

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.

Basic Fiscal Processes – Bank Accounts

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

A	The Anatomy of a Personal Check
P	Janc Doe 123 Main St Anywhere US 10111 ayee Date 7/01/2018 Amount (Numeric Form)
	PAY TO THE ORDER OF ACME Grocery Shop Amount (In Words) EIGHT AND 15/100 DOLLARS Tour Bank 456 Main St Anywheec US 20212
	Lunch W/ Friends Jane Doe 1:1234567891: 100100123911 0790
the b	alance



Basic Fiscal Processes – AP Compliance

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.



Basic Fiscal Processes – AP Compliance

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

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.



Basic Fiscal Processes – Tax Status

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.



Budgets and Fiscal Processes Feedback

This concludes the second section of the online training module. The next portion will include information about CSA Operating and Programming Funds.



CSA Student Organization Funding

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

Applying for CSA Funds

You must submit an online application for CSA funds. Only the treasurer has access to submit applications via the <u>Student Org Management System</u>. 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 <u>applying</u> for <u>Operating Funds</u> and <u>applying for Programming Funds</u>.

Operating 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).

Operating Funds

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 and in the Registration and Funding Guidelines

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.

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 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 <u>Funding</u> 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

202	21 - 2021 C	SA Allocations	//Akatiningsi ka	Received:		
				Reviewed:		
Operating Audit Form For Fall opeating 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				Amt Received:		
	TREA	ASURER.		Req ID:		
				For Office Use Only		
e e e e e e e e e e e e e e e e e e e	I . OCII					
surer Name (First.		name.#				
urganiza	tion Name:					
	T POPUL L	Directions:		##/ augustus		
	A**	Expenses	40			
Category (Select	100000					
from drop down)	Vendor	<u>Explanation</u>	Amount Spent	Audited amt. (Office Only		
Office Supplies	Staples	Post It Notes	\$20			
	+		- 1			
	3		- N			
			7			
			A			
	Total Form					
	Total Expen	ses:				

Programming Funds Audit Form

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

Full Student Org. Name: Title of Program:	
THE VITTURE WITH	
Date of Program:	
Location of Program:	
<u>Income</u>	
Did you have outside income for this event (i.e. admission fee, sponsors, university department contirbution, other student Circle One: Yes or No. If so, please list all sources of income below and attache all supporting documents to	
Source Net Amount Audited am	nount (Office only)
Ex: Venmo / Paypal / USG Ex: \$300	
Expenses	
Category (Select Amount set be	ited Amount (office or
	-
	\$0

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.

Acceptable Receipts for Audits

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.

Thank You For Choosing Papa John's Pizza Restaurant #0220	
Driver: Dustin J Lasko	Papa John's Restaurant #0220 33 Mudson st e
Order # : 0027 Order Time : 01:57:38 pm Out: 05:38:36 pm	Columbus OH 43202 (614) 784-1919
Phone # : (614)291-9317 Customer : Jay	3170. 04/25/2009 05:23pm ************************************
Address : 337 17th Ave W	Name: Jay ************************************
Sector : B4 Delivery Remarks : Call 614-214-6300	Mastercard Mastercard
750SCR – 5–39 14" 1 Top (School Cateri	Account #: xxxxxxxxxxxxxxx9075 i Authorization #: 254459 Reference #: 81765
+Extra Cheese	.45 Batch ID: 0 Order Amount: 114.50
+Pepperoni	.43 Tax: 0.00 Total Amount: 114.50 .47 Mastercard: 114.50
+Mushrooms	Masteroard: 114.50 Tip: (C) &
Discount: 74.85 Tax: 0.00	Total: 124.50
SubTotal: 189.35 Total: 114.50 Balance Due: 0.00	Addtl Tender Amt: 0.00
Mastercard 114.50	Customer Signature
Run Summary Driver: Dustin J Lasko	X Customer Copy
Total Orders: 1 Total Sales: 114.50	**************************************



Acceptable Receipts for Audits

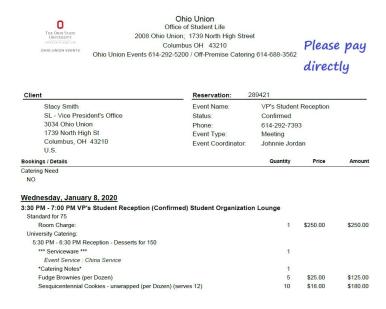
Invoices, along with a receipt showing proof of payment, are acceptable. Both documents must

be submitted.

Fatin Olmez			oln	nez.1@osu.ed	lu I-55946958	I-55946958		
						8:43 AM, 4/21	/2011	
				Res Mill	Reserve Equipment and Materials (IT Service Desk), 2009 Millikin Rd., Room #025 - Phone 614-292-3131			
THE RESERVE AND ADDRESS OF	Date 4/21/2011	\$15.00 per wire	less mic. rente	ed 2 mics		Amount \$30.00	\$30.00	
Oty.	Date 4/21/2011	Invoice paid by:	\$30.00 , rece	ipt: 1-55946	958	Amount \$30.00	\$30.00	
Terms		usage ree				Amount Due:	\$0.00	
04/21/201 Herchant I Terminal I 21900630	D: 0 D: 0996 CREDIT CARI VISA SALE	08:46:06 00000000582844 02967484					ı.	
CARD # INVOICE Batch #: Approva Entry M Mode:	Code:	0001 000010 081978 Swiped Online						
SALE	AMOUNT	\$30.00						
	CUSTOMER	COPY						

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.

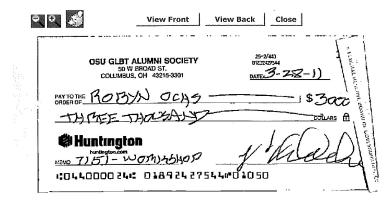




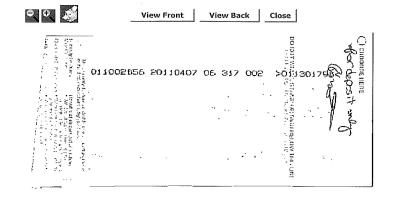
Acceptable Receipts for Audits

Cancelled checks
may be used to
show proof of
payment, but must
also include an
itemized invoice.

Huntington



#Huntington

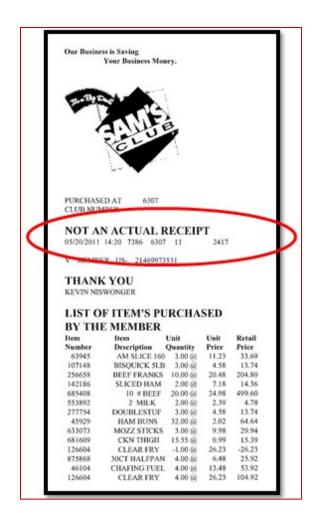




Unacceptable Receipts for Audits

Below are visual examples of unacceptable receipts.

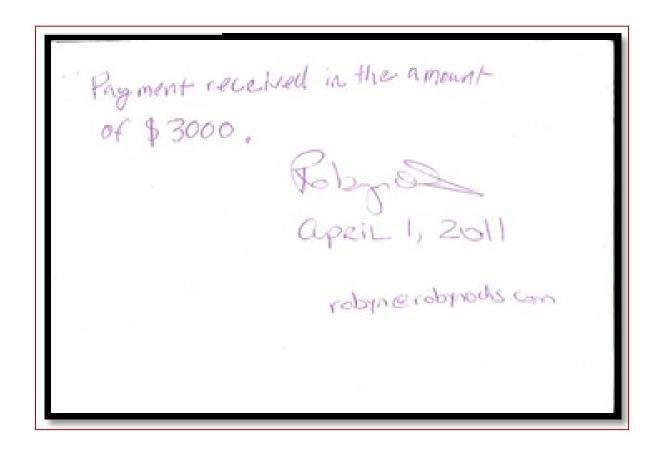
This item provides an itemized list, but it literally reads: "not an actual receipt."





Unacceptable Receipts for Audits

Handwritten receipts are not acceptable.



Unacceptable Receipts for Audits

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.





CSA Funding Feedback Form

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.

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

- Undergraduate Student Government student organization funding: <u>usg.osu.edu/finances/funding_basics/funding_student_orgs</u>
- Council of Graduate Students funding opportunities: <u>cgs.osu.edu/funding-opportunities/</u> (continued on next page)

- Inter-Professional Council funding for student organizations: <u>ipc.osu.edu/resources/funding/for</u> -student-organizations
- OUAB collaborative events application: <u>ouab.osu.edu/plan-an-event-with-ouab</u>
- Student Activities Member Development
 Grant: <u>activities.osu.edu/involvement/student_or</u>
 <u>ganizations/development/member_engagement</u>
 funds

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

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.



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

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-ofrefusal 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



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.

Resource Room Line-of-Credit

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 orga nizations/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.



Student Life Marketing

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 <u>studentlife.osu.edu/secure/marketing</u> 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 <u>studentlife.osu.edu/coke</u> 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



Student Organizations Team Resources

Schedule a Coach meeting at go.osu.edu/CoachRequest for:

 General consultation about university resources, making a budget, fundraising ideas



Resources Webpage

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.

Resources Feedback Form

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.

Next Steps

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.

Next Steps

After completing this module:

- Register for an in-person training session on the <u>Training webpage</u>
- 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 <u>csls@osu.edu</u> and we will address yourge question directly

Next Steps

Review the <u>Student Organizations webpages</u>. Pay particular attention to the pages for <u>Registration</u>, <u>Funding</u>, <u>Student Organization Success</u>
<u>Framework</u>, and <u>Resources</u>.

Contact our team at <u>csls@osu.edu</u> with any additional questions or assistance.