STUDENT ORGANIZATION
OFFICER TRAINING
for Treasurers

THE OHIO STATE UNIVERSITY

OFFICE OF STUDENT LIFE

STUDENT ACTIVITIES

This online module should take between 20-30 minutes to complete and provides important information about policies, procedures, and resources that apply to your role as a student organization 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.

To have a successful experience , we recommend that you:

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

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

Thank you for your engagement, and happy training!

In this online module, we will cover

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

There were be more material, and different topics, covered in the in-person training

The following section will consider the roles and responsibilities of key positions within your organization, and there is no better place to start than with you!

The 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

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

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.

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
- 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.

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

If you are the CFO of your organization, your president is the CEO. Much like you, they have leadership and management responsibilities. Their leadership responsibilities include:

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

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

The vision the president sets for the organization and the financial vision that you have set for the organization should work in tandem. In order to ensure that you all are working together efficiently and effectively, the next section will cover strategies to strengthen that working relationship into a mutually beneficial one.

Organization needs and leader relationships vary greatly, but the relationship between president and treasurer is key. Below are three strategies that, *in general*, should result in a stronger relationship that benefits officers and the organization.

1. **Establish expectations** of each other early. All officers should do this, but particularly the president and treasurer. Spend time at the beginning of your terms establishing what you expect, what you need, and what you hope from each other and from your relationship. Don't let the conversation stop there either – *hold each other accountable* to those standards you set and check in to make sure things are working throughout the year
2. That expectation conversation should set clear and open practices for **communication**. It is important to establish:

How will officers communicate with each other (text, email, GroupMe, at exec meetings, etc.)?

How will officers communicate with the organization?

How do you all prefer to communicate in terms of questions and updates – do you want lots of little updates as they come up, or one larger update on a weekly or biweekly basis?

How will you provide feedback to each other and to other officers (written, verbal, etc.)?

3. Finally it is important you the organization leadership, particularly you to, **meet regularly**. Standing meetings that may benefit an organization include:

One on one meetings with the president and different officers

Executive board or leadership team meetings

General body meetings

Meetings with emerging leaders

Meetings with the advisor

Since the advisor also plays a key role in the organization, the next section will detail their role.

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.

Advisors are required to:

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

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

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

Let the organization thrive or decline on its own merits

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

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

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

How does the advisor best want to be contacted (work phone, cell phone, text, email, etc.)

When is it best to contact the advisor – they are volunteering their time for this role, and may be most responsive during the work day, so make sure to 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

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.

This concludes the first section of the online training module. The next module will include elements central to your role as treasurer – budget management, income, expenses, CSA funds, and fundraising.

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.

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

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 page 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

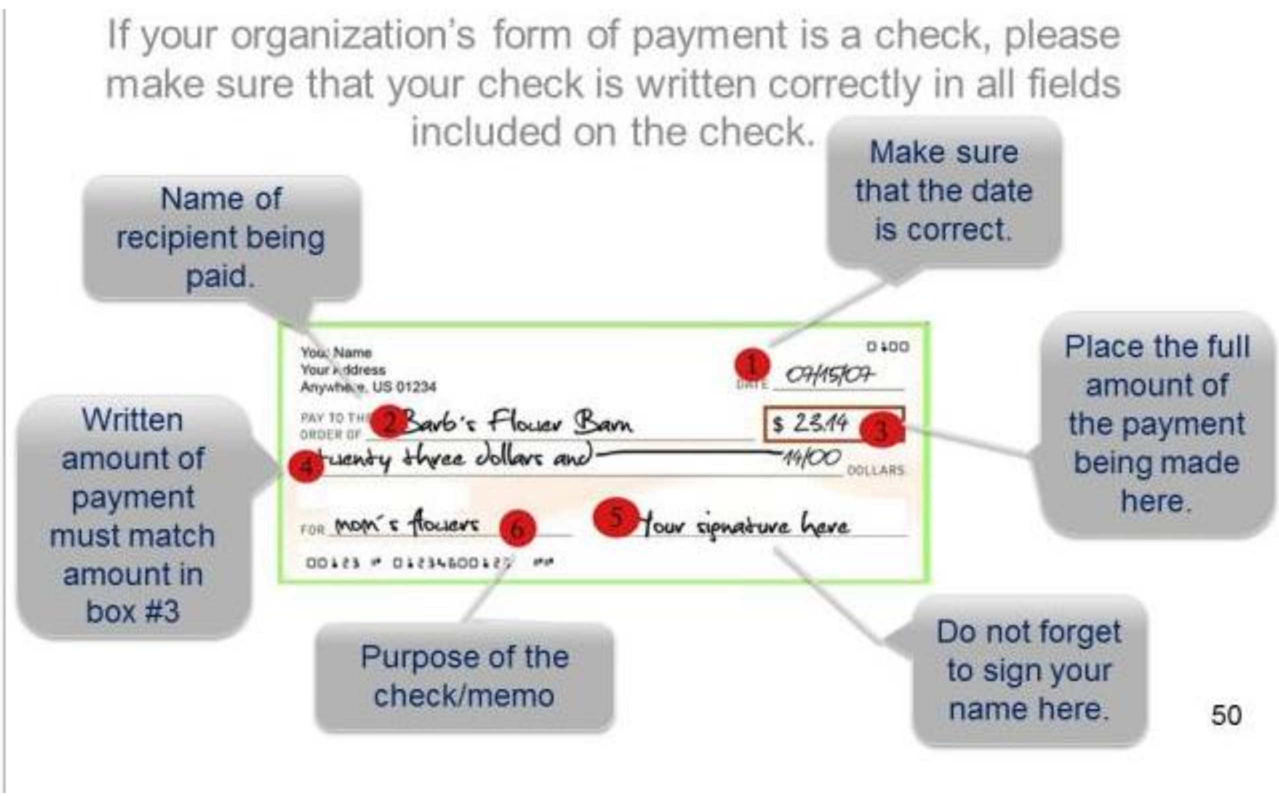
Programming Expenditures

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.



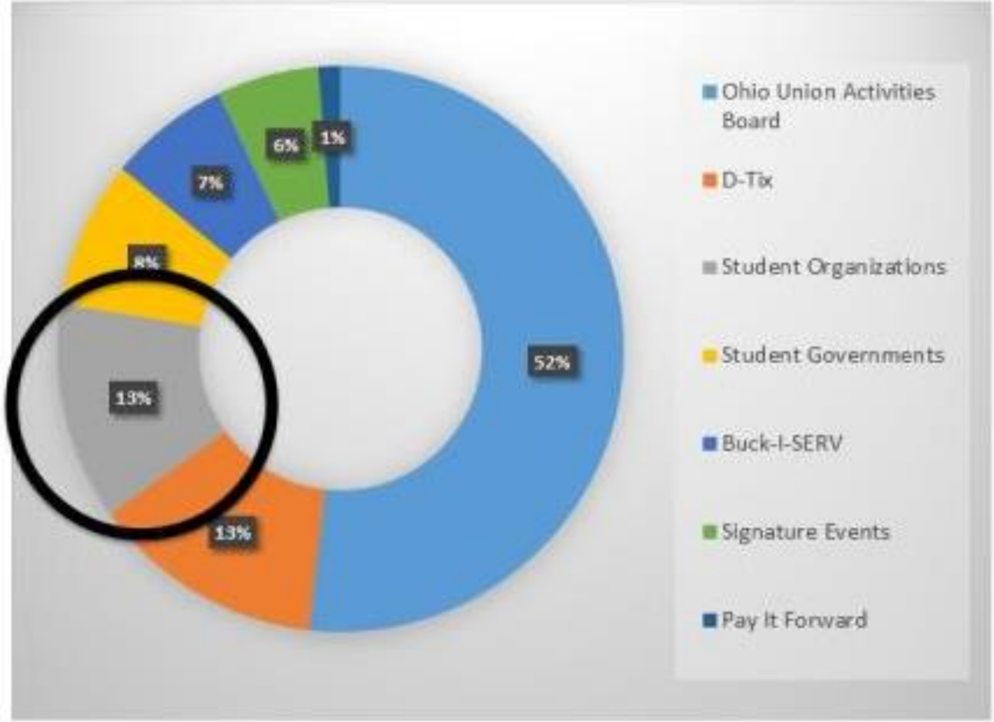
Funding for student organizations comes from the Student Activity Fee, which began in Autumn 2003. All undergraduate, graduate, and professional students on the Columbus campus pay a $37.50 per semester fee, which generates approximately $4 Million annually.

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

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

Student Activity Fee

All Columbus-campus students pay $37.50 into the activity fee each semester.



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

In order to receive funds, a student organization must:

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

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

One section of CSA funds available to organizations are Operating funds.

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

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

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

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

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

Examples of fundable expenses with Operating Funds include:

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

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

In addition to operating funds, organizations are able to apply for a second type of CSA funds: Programming Funds

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

- **New & Re-Established** status organizations may apply for up to **$2,000 per year** for their programs.
- **Established** status organizations may apply for up to **$3,000 per year** for their programs.

This amount can be requested in one lump sum, or spread out over multiple programs throughout the year. Student organizations are also permitted to collaborate on programs and combine funds to support a larger budget event.

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

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

When? There are five strict deadlines by which you must apply for programming funds:

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

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

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

There are two categories for reimbursement:

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

Examples of fundable expenses with Programming Funds include:

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

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

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*

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 an example of the audit form that must accompany all receipts for both programming funds and operating funds audits. All audits must include itemized, original, and legible receipts which show proof of payment

2017-2018 CSA Allocations
Programming Funds Audit Form

Due to the Center for Student Leadership and Service (Room 2095) in the Ohio Union, attn: Lindsay Marx within 30 days of the scheduled program date.
Do NOT return audits to the Information Center or Administrative Office.

This form must be completed by the treasurer. If you are the program planner, please consult with the treasurer to ensure accuracy.

Received: ______
Program # ______
Vendor: ______
App. Amt: $ ______
Check Amt $: ______
IO Amt $:
JE Amt $: ______
Email Group: ______
FOR OFFICE USE ONLY

Full Student Organization Name:

Title of Program:

Date of Program:

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.
Please list each receipt separately - do not total receipts within any category. Use an additional sheet if necessary.
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 2017-2018 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 organizations etc.)?
Circle One: YES or NO. If so, please list all sources of income below and attach all supporting documents to the audit.

Source(s)	Net Amount for organization	*Audited Amt. (Office only)*
Ex. Venmo/Paypal/Undergraduate Student Government	Ex. $300	

Expenses

Category * % is of total program cost, not just category	Vendor(s)	Amount Spent	Explanation	*Audited Amt. [Office Only]*
Ex. Entertainment	Ex. Southwest Mr. Brutus Staples	Ex. $290 $200 $45.67	Ex. Speaker Flight Speaker Fee (waived) Printer cartridge, nametags	
Speaker Costs **Provide names of any gift card recipients on the back page of this audit form				
Entertainment				
OSU Facilities				
Personnel Labor				

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 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 ! 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

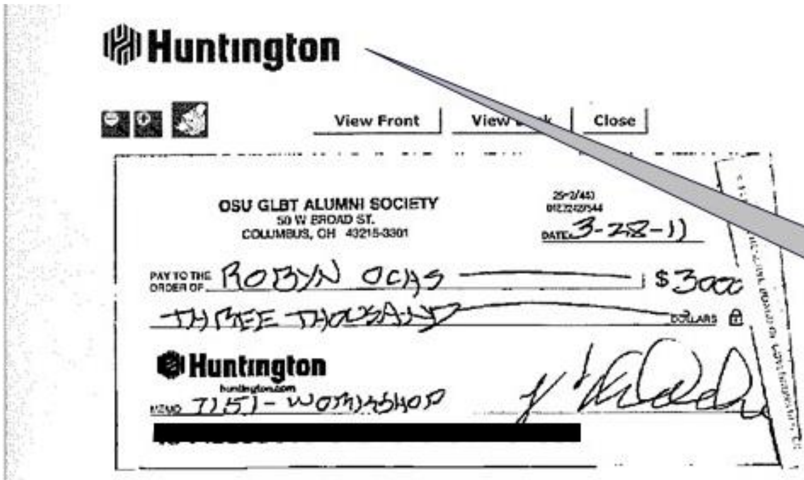
Friday, April 01, 2011

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

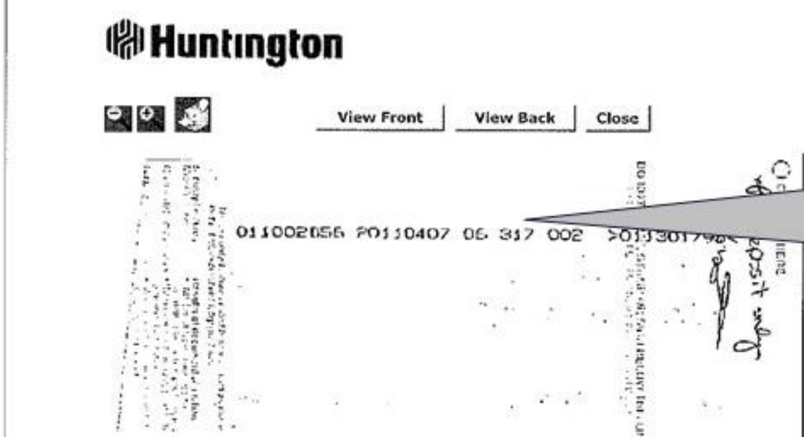
Reserved: 5:30 PM - 12:00 AM			
Room Charge:	1	500.00	500.00
Less 50% Discount			-250.00
Ohio Union Equipment:			
A/V Equipment:			
6:00 PM - 11:30 PM Standard			
Microphone - Wireless - US Bank Conference Theater	1	75.00	75.00
Less 50% Discount			-37.50
Lighting Console - Conference Theater	1	150.00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

48

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!

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

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

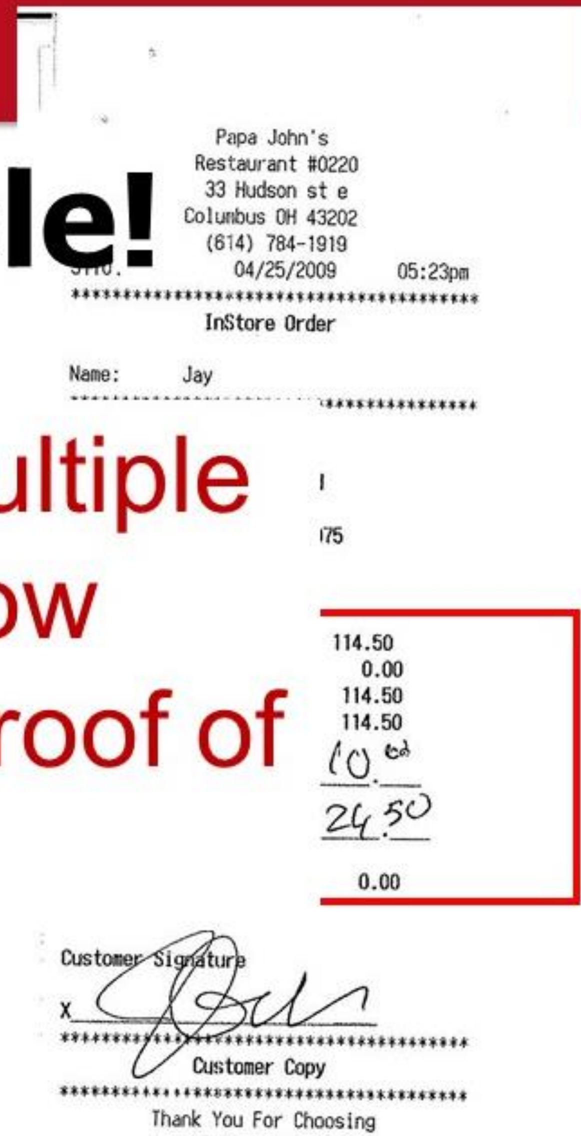
750SCR - 5-39 14" 1 Top (S

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

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!

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 [signature]

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 2905 Ontario St. Columbus OH 43224	Jessica Ly 2905 Ontario St. 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 Imprint/Logo:logo (art will be emailed) Imprint Color:White Imprint Size:3" x 5" 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!

- Student organizations are expected to be financially self-sustaining and CSA funds are only a piece of the puzzle.
- Fundraising is a key skill for any treasurer, as well as every member of the organization. As the financial 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.

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.

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.

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

This concludes the introduction to financial management section. More will be covered in the in-person training, but we will next move into the basics of the annual organization registration process.

Annual Registration Renewal Requirements

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

All student organizations are required annually to complete a registration process that includes trainings as well as the submission of online forms in the Student Organization Management System.

The training requirements are:

The President must complete both the in-person and online training sessions annually

The Treasurer must complete both the in-person and online training sessions annually

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

The online forms required are

General Information

Leaders and Roster

Constitution

Annual Goals (2)

Annual registration happens in one of two registration windows

The Spring Window runs **February 15 – April 30**

The Autumn Window runs **August 15 – October 30**

At the beginning of your organization's window, your status will be moved to Pending. Organizations must complete all annual registration requirements within their registration window to return to Active status. If they are unable to complete their registration requirements within the window, they will be made Inactive until they are able to complete the missing requirements.

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

During the registration windows, organization presidents are encouraged to submit information about off-campus programming in compliance with the Campus Clery Act. The Clery Act is a piece of legislation tied to the university's federal Title IV funding, which requires Ohio State to report on crime statistics.

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

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

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

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

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

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

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

1. You must complete both the online and in-person treasurer training modules by the deadline
2. 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 Registration page on the Student Activities website.

This concludes the section of the module on the basics of the annual organization registration process. We will now move into our final section, which covers resources that are available to student organizations and allow you all to succeed in your roles.

This module covers many of your responsibilities, and more will be discussed at in-person training. It is important to know that you don't have to do it alone! In addition to your fellow organization members, leaders, and advisor(s), you have many resources available to you as a student organization.

The first is the student 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.

Anna Fredendall – Coordinator for Student Involvement
Registration and Training
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Johnnie Jordan – Coordinator for the KBK Center for Student Leadership & Service
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The Keith B. Key Center for Student Leadership and Service is an incredible resource available to all students and student organizations. Located on the second floor of the Ohio Union, student organizations can use the Keith B. Key Center open lounge, reserve meeting room space, and apply annually for locker or office space in the Center. The Keith B. Key Center is also the home of the Resource Room.

Resource Room

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

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

Student Organization Success Framework

Launched in autumn 2017, the Student Organization Success Framework is intended to help student organizations pursue excellence by strengthening individual members, managing organization operations and contributing to our larger community. The Framework identifies **Individual, organizations and community** outcomes where any organization can develop.

Using a self-assessment tool, organizations can identify where they want to grow, then use the Framework to connect with resources across campus.

Use of the Framework is not required, but highly encouraged for organizations who want to improve themselves. Organizations who choose to use the Framework may find they are better prepared to recruit and retain members, engage in collaborations, effectively transition leadership as well as be eligible to apply for Leadership Awards or other recognition opportunities.

More information about the Framework and the Self-Assessment can be found on the Student Organization Success Framework page of the Student Activities website

Student Organization

SUCCESS FRAMEWORK

INDIVIDUAL:

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

ORGANIZATION:

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

COMMUNITY:

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

Student Life Marketing

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

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

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

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

Student Organization Insider

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

Because the *Student Organization Insider* has a distribution of over 4,000 recipients, many organizations also find it valuable to utilize the section of the weekly e-mail reserved for organization announcements. Use this message as an additional means of advertising your events or opportunities for collaboration and recruiting new members. Submit announcements by Tuesday at 12 p.m. through the online Student Organization Insider announcement submission form

Programs and event planning is a major element of many student organizations. As the treasurer, you are responsible for pre-approving expenses and making payments for events, so it is also important you know some of the event planning resources available.

Ohio Union Events and Buckeye Events Network (BEN)

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

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

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

- For Summer Term: January 15
- For Fall Semester: May 15
- For Spring Semester: September 15

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

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

Coca-Cola Beverage Donation Program

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

Other Venue Rentals

There are also a variety of other university facilities that you can also reserve for your space that aren't reserved through Ohio Union Events. For spaces like the Library, RPAC, Faculty Club, and Wexner Center, please make sure to follow the policies set by those locations

Pictured here, please visit the Resources page on the Student Activities website to review the resources listed in this section of the module as well as many others.

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.