STUDENT ORGANIZATION

OFFICER TRAINING

for Presidents
Introductions

Role of Officers

Registration basics

Treasurer Basics and Resources

Discussion and Questions
Before getting started

¬ Slides will be sent to you

§ Sign the sign-in sheet

∞ Ask any questions you have
Raise Your Hand…

New President
Returning President
President of Brand New Organization
Introduce yourself
And describe what
your organization does
How do you successfully lead these types of members?

- Loner
- Over-achiever
- Disengaged
- Forgetful
- Distracter
Student Organizations: Snapshot

1,376 Active student organizations
Total membership: 42,669 students
Average org size: 31
Org size range: 5-600

Updated: July 2017
Role of the Treasurer

- Approve Spending
- Chief Financial Officer
- Manage All Funds
- Request Funds
- Financial Wellness
- Provide Financial Leadership
- Collect Dues
- Maintain Records
Role of the Advisor

Registration Requirements
- Complete training, every 2 years
- Online approvals – registration, goals
- Upload signed indemnification letter (recommended)

NEW in 2017

Ongoing Approvals
- Operating and Programming Funds
- University reservations (varies)
- Signatory on bank account

NEW in 2017

Other Duties as Negotiated
- Meet 1:1 with officers
- Attend meetings
- Oversee finances
- Support officer transition
- Interpret policy
- Maintain history
- Manage risk
- Motivate and inspire
Role of the President

Public Face

Set Vision, Goals

Manage Your Organization

Coord. Meetings

Morale, Team Building

Communicate with Advisors, Treasurers

Build Future Leaders

Prepare for Future Success
Registration Basics
Annual Registration Renewal Requirements

President
- Training
- Complete online registration

Treasurer
- Training

Advisor
- Training (every 2 years)
- Approvals: Registration, Goals
## Registration Windows

### Two Registration Windows

<table>
<thead>
<tr>
<th>Spring Window</th>
<th>February 15 – April 30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autumn Window</td>
<td>August 1 – October 15</td>
</tr>
</tbody>
</table>

- Organizations **self-select** their window
- Pick your Window based on leadership transitions
- **For new organizations**: All requirements must be completed within 60 days or by the last day of the registration Window – whichever is later.
Role of the President

<table>
<thead>
<tr>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete President’s training</td>
</tr>
<tr>
<td>Enter and approve organization roster</td>
</tr>
<tr>
<td>Enter goals</td>
</tr>
<tr>
<td>Upload updated constitution</td>
</tr>
<tr>
<td>Enter organization’s general info:</td>
</tr>
<tr>
<td>• purpose statement</td>
</tr>
<tr>
<td>• anti-hazing statement</td>
</tr>
<tr>
<td>• type of organization</td>
</tr>
<tr>
<td>• meeting information</td>
</tr>
<tr>
<td>• registration window selection</td>
</tr>
<tr>
<td>Fill out Clery reporting form</td>
</tr>
<tr>
<td>Communicate with advisor to complete training and approve registration and goals</td>
</tr>
<tr>
<td>Communicate with treasurer to complete training</td>
</tr>
</tbody>
</table>
Registration Requirements

Roster

Required:

- Primary Leader
- Secondary Leader
- Treasurer
- Advisor
- Must have a minimum of 5 students
- List all members in roster

- May list other officer positions
- Add new or delete old members
- **Must approve all returning members each year**
- If you have co-Presidents, both must complete President Training for both to have login access
Registration Requirements

Constitution

- Purpose Statement
- Member selection and removal processes
- Officer selection and removal processes
- Non-discrimination policy
- Officer titles and duties
Registration Requirements

Goals

- Describe a minimum of 2 goals for the year
- May submit as many goals as you would like
- Consider using the S.M.A.R.T. goal model
- Share goals with your organization membership
Clery Reporting

Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act

• A federal consumer protection statute tied to a University’s eligibility for Title IV funding
• Non-compliance can lead to removal of active status, potentially the removal of federal funding for the university
• Ohio State is required to contact law enforcement authorities for crime information where Ohio State or its students controlled property for a period of time
Clery Reporting

Student orgs will be requested to complete Clery reporting for off-campus events from the past year.

Presidents will submit this with other online updates during their registration window.

Key element – “exclusive use of space”

FAQs available online.
Clery Reporting FAQ

What qualifies an ‘event’ or ‘group gathering’?

• Any off-campus gathering of members of the university community that planners or attendees would consider to be sponsored by, or associated with, your organization could qualify and should be submitted for review.
• If you’re not sure if something qualifies, please include it and our staff will determine whether it qualifies.
• Events and group gatherings at official Greek chapter houses or any on-campus facilities do not need to be registered here, because those addresses are considered to be controlled year-round.

What is a ‘written agreement’ and how do I know if I have one?

• A written agreement is any paper or electronic documentation that indicates that you have exclusive use of a space for a period of time (signed contract, a rental agreement, an email between two individuals, a confirmation or receipt from a hotel or travel site reservation, etc.)

What does ‘exclusive use of space’ mean?

• ‘Exclusive use of space’ means that the space is set aside for your use during the timeframe of the agreement. If another group subsequently asked to use the same exact space during the same time, they would be told that it was unavailable.
• For example, group tickets to a Columbus Blue Jackets game – no (others present), However, group tickets to a luxury box at a Columbus Blue Jackets game – yes (exclusively your organization)
• A space can be anything that can be reserved or rented, such as: a building or facility, a room in a building(banquet room, hotel room, or party room), or an outdoor space or venue(pool, an amphitheater, or recreational/athletic field).
• Things like Laser tag, ropes course, mini golf courses, or go-kart tracks would not count unless your group legitimately had rented the entire facility, and the only people present, aside from the facility’s staff, were those invited or admitted by your organization.
Registration Status

- Pending
- Active – New/Re-Established
- Active – Established
- Inactive
# Registration Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pending</strong></td>
<td>Brand new organizations and Organizations in the process of completing registration requirements (within registration window).</td>
</tr>
<tr>
<td><strong>Active – New/Re-established I or II</strong></td>
<td>Organizations that have completed all registration requirements within window; Have been registered for less than 2 continuous years, or have fewer than 15 members</td>
</tr>
<tr>
<td><strong>Active – Established</strong></td>
<td>Organizations that have completed all registration requirements within window; Have been registered for more than 2 continuous years, and have at least 15 members</td>
</tr>
<tr>
<td><strong>Inactive</strong></td>
<td>Organizations that have not completed all registration requirements by their registration window deadline.</td>
</tr>
</tbody>
</table>
Student Organization Management System

Clery Reporting

Next, click on ‘Clery Reporting’
Video Highlights

- Line of credit listed on org info page
- Previous status on org info page
- Roster: enter name.# carefully, approve all members
- Constitution: ‘click to keep’ to review current, read all sections to ensure all 5 requirements!
Academic Requirements

Minimum GPA Requirements for officers

<table>
<thead>
<tr>
<th>Officer</th>
<th>Minimum GPA Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>2.0</td>
</tr>
<tr>
<td>Graduate</td>
<td>3.0</td>
</tr>
<tr>
<td>Professional</td>
<td>2.0</td>
</tr>
</tbody>
</table>

- Officers must be enrolled in classes full-time
- Students may not serve as an officer of more than 3 different student organizations
Questions about registration?

Visit our office hours:

<table>
<thead>
<tr>
<th>Mondays</th>
<th>Thursdays</th>
</tr>
</thead>
<tbody>
<tr>
<td>2pm-3:30pm</td>
<td>10:30am-12pm</td>
</tr>
<tr>
<td>President’s Room – CSLS</td>
<td>President’s Room – CSLS</td>
</tr>
<tr>
<td>Ohio Union</td>
<td>Ohio Union</td>
</tr>
</tbody>
</table>

*Any location changes or cancellations will be reflected in Student Organization Insider*
Treasurer Basics
All Columbus-campus students pay $37.50 into the activity fee each semester.
Funding Basics

To apply for funds:
- Must be applied for by treasurer
- Can be applied for regardless of status

To receive funds:
- Active Status
- No outstanding debt or unpaid bills
- EIN*
- External bank account

*Your organization’s EIN is your organization’s social security number. This must be applied for through the IRS.
Operating Funds

Use for daily operations

Apply between July 1 and April 1

Funds issued in advance

$200 annually

Submit audit and receipts by May 1
## Operating Expenses

<table>
<thead>
<tr>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising</td>
</tr>
<tr>
<td>Promotion</td>
</tr>
<tr>
<td>Printing</td>
</tr>
<tr>
<td>National Dues Fees</td>
</tr>
<tr>
<td>Travel and Transportation to retreats and conferences</td>
</tr>
<tr>
<td>Bank Charges Checks</td>
</tr>
<tr>
<td>Membership Awards</td>
</tr>
<tr>
<td>Equipment Costs</td>
</tr>
<tr>
<td>Facility Rental Fees</td>
</tr>
<tr>
<td>Books Subscriptions</td>
</tr>
<tr>
<td>Office Supplies</td>
</tr>
<tr>
<td>Up to $100 on food for recruitment events</td>
</tr>
</tbody>
</table>

*No computer equipment*
Programming Funds

- Use for on-campus programs
- $2,000 or $3,000 based on level of Active status
- Apply by one of 5 deadlines, based on program date
- Funds issued on reimbursement basis
- Submit audit and receipts within 30 days of program
Programming Expenses

- Food, Beverages (40%)
- Publicity (20%)
- Take-Aways (20%)
- Apparel (20%)
- Service Travel (50%)

- Equipment Rental, Consumable Supplies
- Ohio State Facilities
- Personnel

- Speaker Costs, Entertainment
Fundable Programs

1. Educational or service activity
2. Open to all students across campus
3. Broadly marketed
4. Held on campus
Non-Fundable Programs

- Revenue creation
- Recruitment
- Tabling
- Donations
- Banquets
- Political lobbying
## Application Deadlines

<table>
<thead>
<tr>
<th>Apply by...</th>
<th>Program Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1</td>
<td>August 16 - October 15</td>
</tr>
<tr>
<td>September 1</td>
<td>October 16 - December 31</td>
</tr>
<tr>
<td>November 15</td>
<td>January 1 - March 15</td>
</tr>
<tr>
<td>February 1</td>
<td>March 16 - May 31</td>
</tr>
<tr>
<td>April 15</td>
<td>June 1 - August 15</td>
</tr>
</tbody>
</table>
Fundraising & Sponsorship

Based on university agreements…

Barnes & Noble (fundraising)
Coca-Cola (sponsorship)
Huntington Bank (first right of refusal)
U.S. Bank (for events in the Ohio Union only)
Fundraising Ideas

Dues

Sell t-shirts

Campus Parc

Concession stands

Restaurant nights

Schottenstein Center cleanups

*No spending restrictions on money you fundraise*
Additional Funding Resources

- ouab.osu.edu
- ipc.osu.edu
- cgs.osu.edu

- usg.osu.edu
Questions about funding?

Lindsay Marx (Marx.78)
Fiscal Officer for Student Life

Weekly office hours:

<table>
<thead>
<tr>
<th>Thursdays</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:30am-12pm</td>
<td>2-3:30pm</td>
</tr>
<tr>
<td>Flag Room– CSLS</td>
<td>Flag Room – CSLS</td>
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Any location changes or cancellations will be reflected in Student Organization Insider
Resources Overview
Student Organization Staff

Anna Fredendall – Coordinator for Student Involvement
*Registration and Training*
Fredendall.7@osu.edu

Johnnie Jordan – Coordinator for the KBK Center for Student Leadership & Service
*Resource Room & Center spaces*
Jordan.597@osu.edu

Lindsay Marx – Business Development Coordinator
*Student Organization Funding*
Marx.78@osu.edu

Jen Pelletier – Associate Director for Leadership, Service, and Student Organizations
Pelletier.17@osu.edu
Student Organization Insider for March 1, 2017

Student Activities Announcements

Registration window for SPRING is now open!
Student Organization Office Hours
Interested in Advising a Student Organization?
Celebrate students, organizations, faculty, staff and alumni with Ohio State's most delicious honor!
Buckeye Soup is back! “Buckeyes for Sustainability”
Apply for the Nonprofit Immersion Program 2017-2018

Student Organization Announcements
Keith B. Key Center for Student Leadership and Service
Click here for video
Resource Room

Variety of supplies for student orgs and individual users

$250 line-of-credit for Active student orgs
Resource Room

- Any person on the Roster may spend on the Line-of-Credit, unless you limit it
- Make Resource Room requests in-person (balloon orders, room reservations)
  - Monday - Friday: 8 a.m. - 9 p.m.
  - Saturday - Sunday: 11 a.m. - 8 p.m.
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
Leadership Development

Workshops, Trainings and Retreats

- Over 30 different topics
- Staff and student facilitators
- Consultation or facilitation of entire agenda
- Coca-Cola Retreat Packages
Member Recruitment and Retention

- Create a plan for team building
- Develop committees with responsibilities
- Create a mentor system between newer and returning members
- Create a mailing list to communicate with organization members
Programming Resources

Ohio Union Events
Buckeye Events Network (BEN)
Coca-Cola Beverage Donation

Working with food
Showing a movie
Transportation
International Travel
Ohio Union Events

The Ohio Union can provide:

- Meeting & Event Space
- Catering
- Tabling in the Great Hall
- Access to Classroom Space

Cancellation fees may apply! You could be charged if you do not give proper notice before cancelling.

Limited number of rooms at discount
Coke Beverage Donation

Donations are for programs, not meetings

The event must be on or near campus

Requests must be submitted at least 2 weeks BEFORE the program date

http://studentlife.osu.edu/coke
Marketing Resources

Graphic Designers
Photography/ Videography
Vendors for promotional items
Student Activities online calendar
Ohio Union digital screens
University Brand compliance (brand.osu.edu)

studentlife.osu.edu/resources select “Marketing Request”
Technology Resources

Website hosting service

NEW in 2017

Organizational email listservs
Organizational email accounts

http://activities.osu.edu/involvement/student_organizations/resources
## Resources Website

### STUDENT ACTIVITIES

<table>
<thead>
<tr>
<th>About Us</th>
<th>Involvement</th>
<th>Programs and Events</th>
<th>Contact Us</th>
</tr>
</thead>
</table>

**Involvement**
- Student Organizations
- Find a Student Organization
- Registration
- Training
- Funding
- Resource Room
- Information for Advisors

**Resources**
- Leadership Development
- Service and Outreach
- Student Government
- Graduate and Professional Student Programs
- Sorority and Fraternity Life
- OSU Votes
- Center for Student Leadership and Service

### Resources

- Training
- Registration
- Funding
- Events
- Group Travel
- Marketing
- Technology
- Successful Leadership
- Additional Resources

### Training

**Training Presentations**
- President Training
- Treasurer Training
- Advisor Training

**Handouts from Training**
- Training Handout
- Roadmap for Success
- Dates to Know

(Go to top)

### Registration

**Management System Tutorial Videos**
- For Presidents
Wrap up and Questions
Thank You for Attending

Before You Leave:
Sign attendance sheet

Following Today’s Training:
Confirmation email, links/ resources
Visit the Resource Room
Visit activities.osu.edu

Contact Us:
csls@osu.edu