

**STUDENT ORGANIZATION  
OFFICER TRAINING**

— *for Treasurers* —



**THE OHIO STATE  
UNIVERSITY**

OFFICE OF STUDENT LIFE

**STUDENT ACTIVITIES**

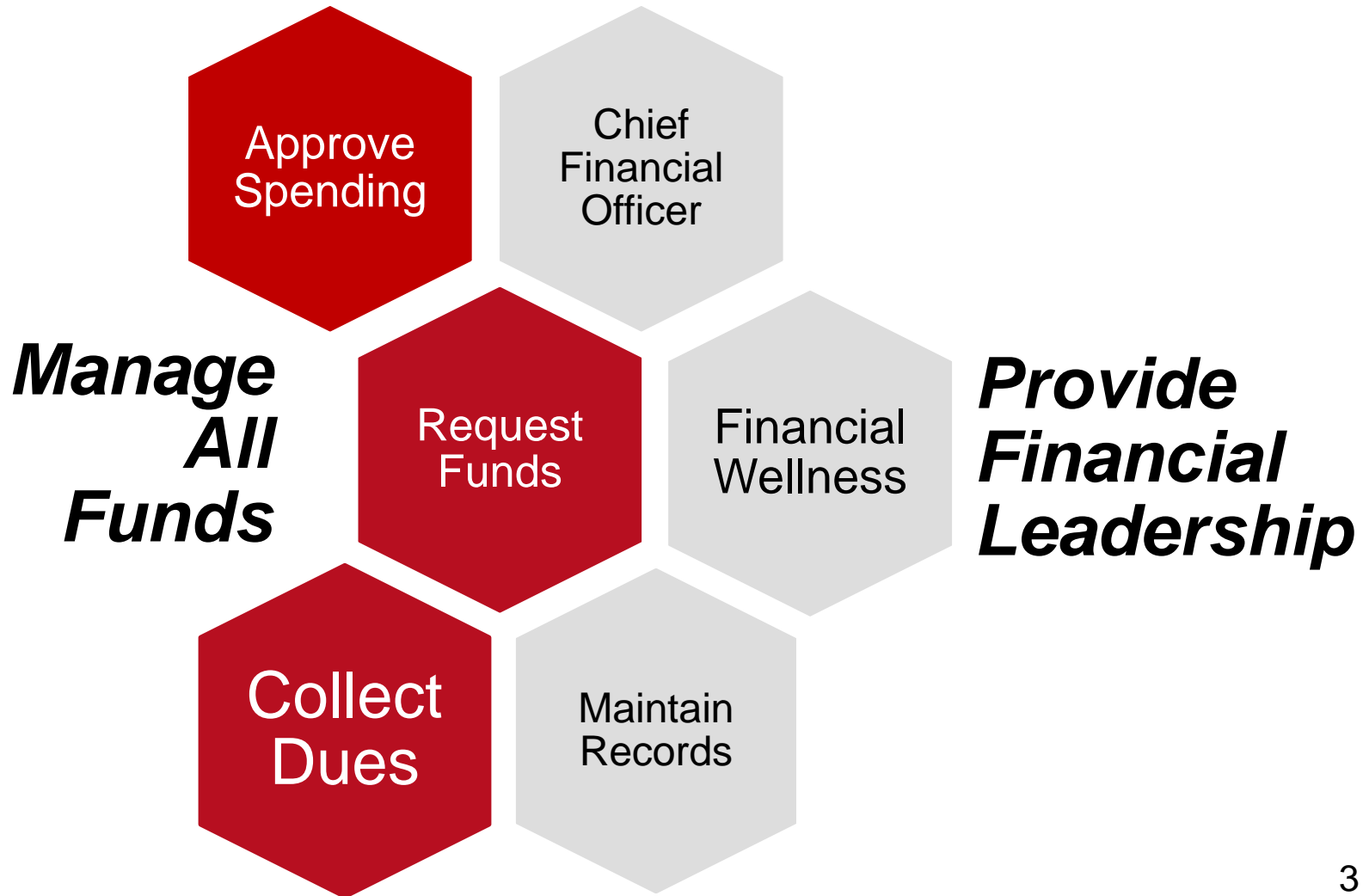


# Training Outline

- Introductions
- Treasurer Responsibilities
- Available Funding
- Auditing CSA Funds
- Registration Basics
- Roles and Responsibilities
- Resources for Operations



# Role of the Treasurer





# Budget Management

## Maintain Written Budget

- Google Doc
- Cell phone Apps
- Mobile Banking

## Approve All Expenses

- Only YOU can approve expenses
- Don't spend more than you have
- No receipt = No reimbursement

## Keep All Financial Records

- Present frequent updates to organization
- Builds more accurate budgets
- Pass along to next treasurer



# Sample Budgets

<b>Operating Expenditures</b>			
<b>Budget Item</b>	<b>Budgeted Cost</b>	<b>Actual Cost</b>	<b>Variation</b>
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
<b>OVERALL (A)</b>	5025	4602.92	422.08



# Sample Budgets

8	<b>Programming Expenditures</b>			
9				
0	<b>Budget Item</b>	<b>Budgeted Cost</b>	<b>Actual Cost</b>	<b>Variation</b>
1	Ohio Union Space	2000	2000	0
2	Catering	500	800	300
3	A/V Needs	300	250	-50
4	Labor	167.5	167.5	0
5				0
6				0
7				0
8				0
9				0
0				0
1				0
2	<b>OVERALL (B)</b>	2967.5	3217.5	

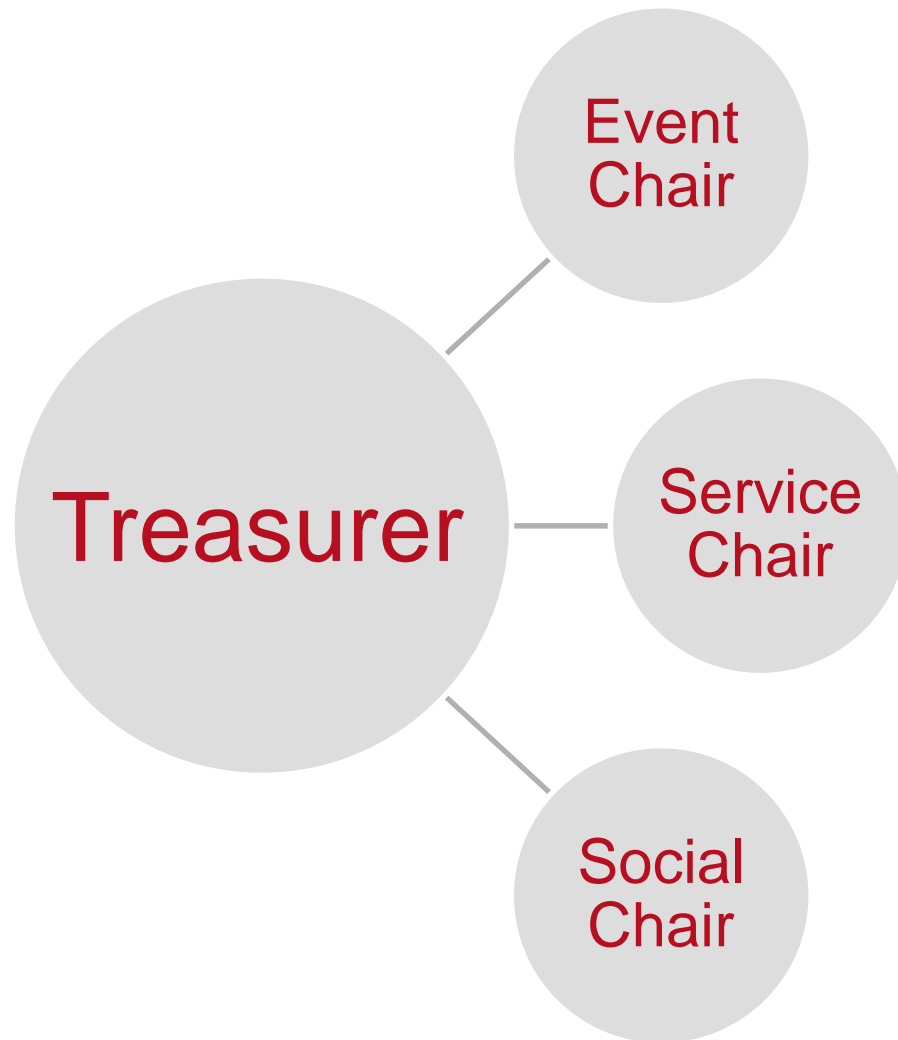


# Sample Budgets

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



# Event Planning



- Be involved with the planning stages of each event
- Meet regularly with chairs to discuss budget
- Set realistic expectations and budgets





# Fundraising

- Organizations may only partner with Barnes and Noble if fundraising with a bookstore

Alumni  
Base

Sell t-shirts

Campus Parc

Staff concession stands

Restaurant Nights

Schottenstein Center Cleanups

\*No spending restrictions on money you  
fundraise\*



# 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)

**BARNES & NOBLE**

*Coca-Cola*

 **Huntington**

**usbank**



# Additional Funding Resources



[ouab.osu.edu](http://ouab.osu.edu)



[ipc.osu.edu](http://ipc.osu.edu)



[cgs.osu.edu](http://cgs.osu.edu)



UNDERGRADUATE  
STUDENT GOVERNMENT

[usg.osu.edu](http://usg.osu.edu)



# Fundraising, Sponsorship, Collaboration

- A great way to supplement your budget!
- Your organization is able to raise funds however you'd like to while keeping in mind state and federal laws for exchanging money
- Collaborate with Offices and Departments on campus or other student organizations



# Coke Beverage Donation



Donations are for events, rather than for meetings

The event must be on or near campus

The request must be made at least 2 weeks prior to the event <http://studentlife.osu.edu/coke>

Not able to serve or distribute non-Coca-Cola products on campus property, nor use university funds to purchase non-Coca-Cola products for events or programs on or off campus.



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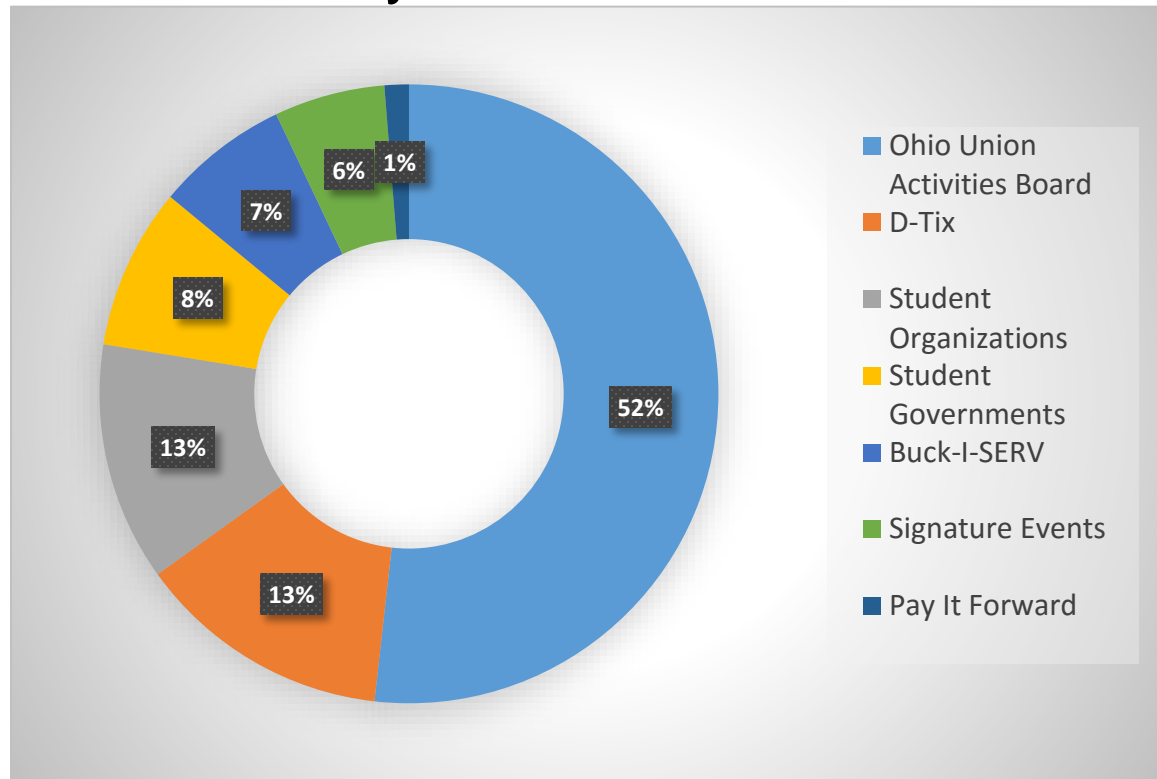
# CSA Funding Process



# Student Activity Fee

All students pay \$37.50 into the activity fee each semester.

The fee is allocated to:





# Funding Oversight

**Council on Student Affairs**

```
graph TD; CSA[Council on Student Affairs] --- AS[Allocations Subcommittee]; CSA --- SAS[Student Activities Staff]; CSA --- T[Treasurers];
```

**Allocations  
Subcommittee**

**Student  
Activities Staff**

**Treasurers**





# Eligibility for Funding

1. Obtain EIN from IRS



2. Complete AP Compliance form



3. Create organization checking account



4. Apply for funds

- Check out [activities.osu.edu](http://activities.osu.edu) for step by step instructions

- Form can be found on the Student Activities website

- Huntington, US Bank, and PNC are great options

- Only the treasurer can apply for CSA funds



# Funding website

[http://activities.osu.edu/involvement/student\\_organizations/funding](http://activities.osu.edu/involvement/student_organizations/funding)

Important funding information can be found on this page:

- Audits
- EIN information
- AP compliance form



# STUDENT ACTIVITIES



Student Organization Management System

Current Logged in as **himes.86** (Logout)

Tools +

Manage Orgs +

Advisor Approvals

Org Information +

CSA Links +

Funding +

Administrative +

Report Server

You are currently logged in as the General Member for **Ski and Board Club at OSU**

Programming Request Form

Operating Request Form

EIN Information

Use the following management pages to update information about your student organization, view your training history and sign up for new trainings, check on past funding requests and submit new applications.

Contact the [Center for Student Leadership and Service](#) with any questions or assistance in using the features of this management site.

[Choose Different Organization/Find Leader](#)

To change groups, please click on your position for the group below.

**Brutus Buckeye Fan Club - Primary Leader**

- [View Org Information](#)
- [General Info](#)
- [Leaders & Roster](#)
- [Constitution](#)
- [Goals](#)
- [Space Request Form](#)

From here, you can view EIN information, past and current requests and their status



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# Operating Funds



# Operating Funds

Very flexible  
for use  
in daily  
operations

\$200  
annually

Apply  
between July  
1<sup>st</sup> and April  
1<sup>st</sup>

Check out in  
advance

Submit  
receipts and  
unused  
funds by  
May 1st



# Operating Expenses

Advertising  
Promotion  
Printing

National  
Dues  
Fees

Travel and  
Transportation  
to retreats and  
conferences

Bank  
Charges  
Checks

Membership  
Awards

Equipment Costs  
Facility Rental Fees

Books  
Subscriptions

Office  
Supplies

Up to \$100 on food for  
recruitment events

\*No computer equipment



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**Student Activities**

# **Operating Funds Request**



Apply for funds online

Only the treasurer will receive a confirmation email right away  
has access to the application

Receive email once request has been processed

Pick up check from Resource Room

May be asked for additional information

Submit all receipts and unused funds at once  
It is ok if actual expenses differ from your application

Submit audit by May 1<sup>st</sup>





# Top Five Things You Need to Know About Operating Funds

1. \$200 annually
2. Spend on items needed for day to day operations
3. Apply between July 1<sup>st</sup> and April 1<sup>st</sup>
4. Submit audit by May 1<sup>st</sup>
5. Only the treasurer has access to the application



# Questions?



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# Programming Funds



# Programming Funds

Eligible for  
\$2000 or \$3000  
depending on  
level of active  
status

Funds issued  
on a  
reimbursement  
basis

Can pay  
departments,  
the RPAC, and  
Ohio Union  
directly

Must submit  
receipts  
within 30  
days of your  
event

Apply by one  
of 5 deadlines,  
depending on  
event date



# Programming Funds

Request  
deadline  
based  
on event  
date:

Event Date	Request Deadline
August 16 - October 15	July 1
October 16 – December 31	September 1
January 1 – March 15	November 15
March 16 – May 31	February 1
June 1 – August 15	April 15



# Fundable Programs

1. Educational or Service Activity

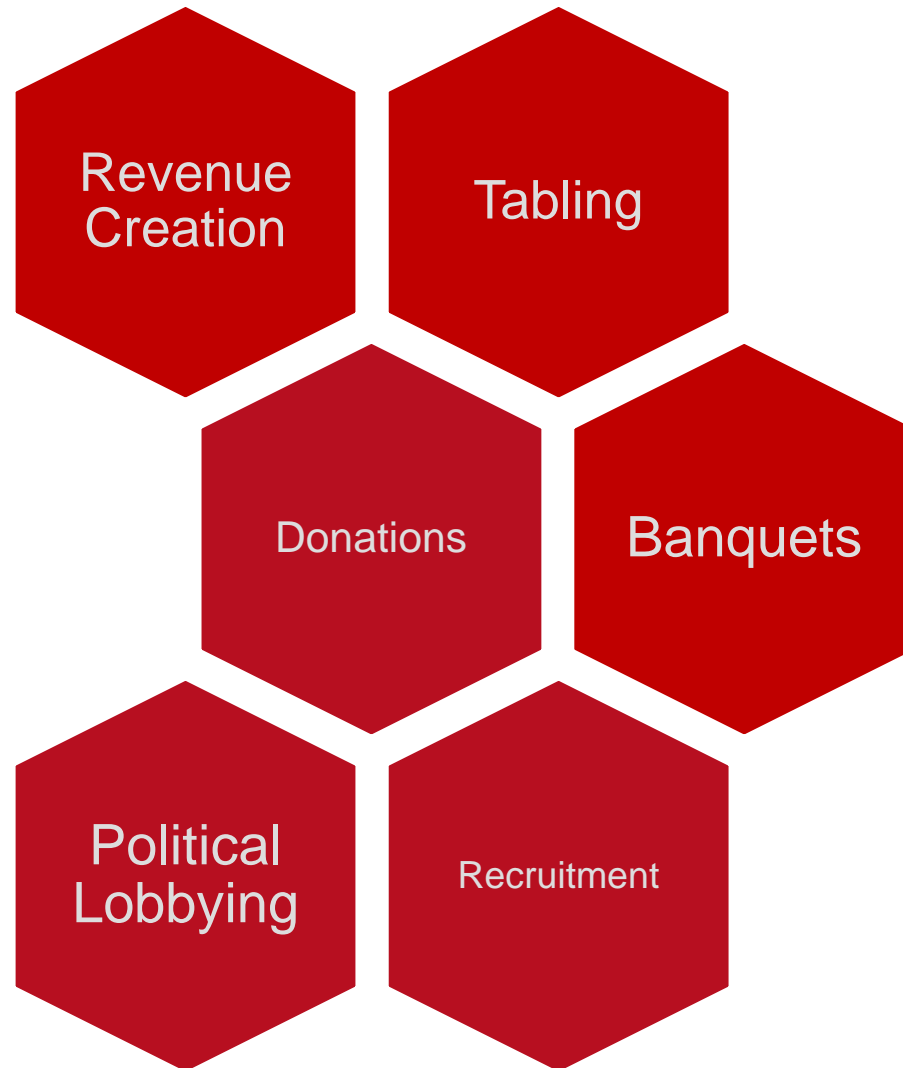
2. Open to all students across campus

3. Broadly marketed

4. Be held on campus



# Non-Fundable Programs





# Reimbursement Categories

## Fully Fundable

Reimbursed up to the approved amount

Speaker fees, venue rentals

Consumable supplies, speaker travel

## Percent Limited

Reimbursed at a percentage of total expenses

Food (40%)  
Apparel (20%)  
Marketing (20%)

Takeaways (20%)  
Service Travel (50%)





# Programming Funds Request



# Programming Funds Timeline

Apply by  
deadline

Will receive  
confirmation  
email

Allocations  
committee  
review

Submit  
audit within  
30 days

Your actual  
expenses  
can vary  
from your  
application  
Will be approved  
or asked for more  
information  
- email

MacGregor  
if unsure

Will receive  
two emails  
- check  
has been  
requested  
and check  
available

Pick up  
check

Hold  
program



# Top Five Things You Need to Know About Programming Funds

1. \$2000 or \$3000 annually
2. Issued on a reimbursement basis
3. Some reimbursements are based on a percentage
4. Apply by 1 of 5 deadlines, based on event date
5. Audits due 30 days after event



# Questions?



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# Completing Audit Forms



# Submitting an Audit

Operating and programming funds only



Original, itemized receipts



Submit to Resource Room

- Audit forms can be found on Student Activities website

- Must show proof of payment and exactly what was purchased

- It's ok if actual expenses vary from the original application



### 2014-2015 CSA Allocations Programming Funds Audit Form

Due to the Center for Student Leadership and Service in the Ohio Union,  
attn: MacGregor Obergraff within 30 days of the scheduled program date

1. Write in your student organization, event name, and event date.

Received: _____
Program # _____
App. Date _____
Vendor: _____
App. Amt: \$ _____
Check Amt \$: _____
JE Amt \$: _____
Email Group: _____
<b>FOR OFFICE USE ONLY</b>

Full Student Organization Name: The Brutus Buckeye Fan Club

Title of Program: We Love Brutus 2K15

Date of Program: January 11<sup>th</sup>, 2015

**Directions**

2. List expenses individually in the most appropriate column.

Open to make notes.  
Categories.

Category <small>* % is of total program cost, not just category</small>	Vendor(s)	Amount Spent	Explanation	Audited Amt. [Office Only]
<u>Ex.</u> Entertainment	<u>Ex.</u> Southwest Mr. Brutus Staples	<u>Ex.</u> \$290 \$200 \$45.67	<u>Ex.</u> Speaker Flight Speaker Fee (waived) Printer cartridge, nametags	
<b>Speaker Costs</b>				
3. Attach all receipts to audit sheet and drop off at the Resource Room.				
<b>Personnel Labor</b>				



# Right Store. Right Price.

2913 OLENTANGY RIVER RD.  
614-265-2800  
YOUR CASHIER WAS LUCAS

	HMK CARD	2.99 I
	KROGER PLUS CUSTOMER *****7018	
	TKYH ICE TEA PC	2.89 B
SC	AUTOMATIC COUPON	0.10
	KRO DRNG JCE PC	3.49 F
SC	AUTOMATIC COUPON	1.50
	SNNYD PUNCH	3.99 B
	CANTALOUPE PC	1.88 F
SC	AUTOMATIC COUPON	0.87
WT	2.65 lb @ 2.34 /lb	6.20 F
	GRAPES	
WT	1.77 lb @ 2.21 /lb	
	GRAPES RED	3.91 F
	TAX	0.67
	**** BALANCE	26.02

016 Kroger #221  
2913 OLENTANGY RIVER RD.  
COLUMBUS OH 43202  
VISA Purchase  
\*\*\*\*\*3813  
TOTAL: 26.02  
REF#: 043718

VISA CHANGE 0.00  
TOTAL NUMBER OF ITEMS SOLD = 7

\*\*\*\*\*YOUR KROGER SAVINGS TODAY\*\*\*\*\*  
STR CPN & KRO PLUS SAVINGS \$ 2.47  
TOTAL COUPONS \$ 2.47  
TOTAL SAVINGS (8 pct.) \$ 2.47  
\*\*\*\*\*YOUR KROGER SAVINGS TODAY\*\*\*\*\*

01/08/11 06:21pm 221 1 272 120  
\*\*\*\*\*  
ENTER TO WIN

# Right Store. Right Price.

2913 OLENTANGY RIVER RD.  
614-265-2800  
YOUR CASHIER WAS SELF CHECKOUT

	KROGER PLUS CUSTOMER *****7143	
	KRO DRNG JCE PC	3.49 F
S	AUTOMATIC COUPON	1.50
S	TKYH GRN TEA PC	1.29 B
	AUTOMATIC COUPON	0.74
WT	1.65 lb @ 2.05 /lb	
	CABBAGE	1.07 F
	PPR BELL GRN	0.66 F
WT	1.07 lb @ 1.00 /lb	
	APL RED DEL	1.07 F
WT	1.06 lb @ 1.00 /lb	
	RANR GALA	1.06 F
WT	0.60 lb @ 1.55 /lb	
	ROMA TOMATO	0.93 F
	HLTL BREAD	2.19 F
	TAX	0.08
	**** BALANCE	11.80

016 Kroger #221  
2913 OLENTANGY RIVER RD.

VISA CHANGE 0.00  
TOTAL NUMBER OF ITEMS SOLD = 8

\*\*\*\*\*YOUR KROGER SAVINGS TODAY\*\*\*\*\*  
STR CPN & KRO PLUS SAVINGS \$ 2.24  
TOTAL COUPONS \$ 2.24  
TOTAL SAVINGS (16 pct.) \$ 2.24  
\*\*\*\*\*YOUR KROGER SAVINGS TODAY\*\*\*\*\*

01/29/11 09:45am 221 84 24 #  
\*\*\*\*\*  
ENTER TO WIN

# Save a lot

#24513  
1254 MORSE RD.  
COLUMBUS, OH43229  
(614)438-4055

	STIC LARGE	\$0.40 A
	0.99 F	\$4.76 F
	1.24 F	
	0.99 F	
	1.79 F	
	1.79 F	
	1.24 F	
	1.00 F	
PC	0.39	
	1.69 F	
	1.24 F	
	1.79 F	
	3.13 F	.5 F
	1.00 F	
	2.99 F	.98 F
	1.00 F	
	00 T	
		\$2.97 F
		\$4.00 F
		\$3.57 A F
		\$9.90 F
		\$1.19 F

\$59.08  
\$59.08

\*\*\*\* 1449

186

\$0.00

XABLE-VAL TAX-VALUE  
\$3.97 \$0.27 A

## Purchase only Coca-Cola Products!



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

UNIVERSITY



Papa John's  
Restaurant #0220  
33 Hudson st e  
Columbus OH 43202  
(614) 784-1919

04/25/2009 05:23pm

\*\*\*\*\*

InStore Order

Name: Jay

\*\*\*\*\*


1  
175

114.50  
0.00  
114.50  
114.50  
10.00  
24.50  
0.00

# Acceptable!

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

Proof of payment

Customer Signature  
X   
\*\*\*\*\*  
Customer Copy  
\*\*\*\*\*  
Thank You For Choosing  
Papa John's

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

Total Orders: 1  
Total Sales: 114.50

Patron Fatih Olmez		Invoice number <b>1-55946958</b>	
		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
1	4/21/2011	\$15.00 per wireless mic. rented 2 mics	\$30.00
			Subtotal \$30.00
Payments			
Qty	Date	Description	Amount
1	4/21/2011	Invoice paid by: \$30.00 , receipt: 1-55946958 -- usage fee	\$30.00
			Subtotal \$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: 00000000582844  
Terminal ID: 02967484  
219006300996

CREDIT CARD  
VISA SALE

CARD # XXXXXXXXXXXX7256  
INVOICE 0001  
Batch #: 000010  
Approval Code: 081978  
Entry Method: Swiped  
Mode: Online

SALE AMOUNT \$30.00

CUSTOMER COPY

# Acceptable!



# Not Acceptable

Payment received in the amount  
of \$3000.

Robyn

April 1, 2011

robyn@robynoahs.com



View Front View Back Close

OSU GLBT ALUMNI SOCIETY  
50 W BROAD ST.  
COLUMBUS, OH 43215-3301

25-2/43  
01232427344  
DATE: 3-28-11

PAY TO THE ORDER OF: ROBYN OCHS \$3000  
THREE THOUSAND DOLLARS

Huntington  
huntington.com

MEMO: T151-WOMASHOP

*[Signature]*

# Proof of Payment: Cancelled Check

From the bank account, not a photocopy of the check



View Front View Back Close

011002856 20110407 06 317 002 2011301798

DO NOT WRITE IN THESE SPACES

DEPOSIT ONLY

*[Signature]*

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

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

Date	Order #
3/31/2011	20933

<b>Bill To</b>
Jessica Ly 2905 Ontario St. Columbus OH 43224

<b>Ship To</b>
Jessica Ly 2905 Ontario St. Columbus OH 43224

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

Item	USI Item #	Description	Qty	Rate	Amount
Padfolios Customize	8241255	Promotional Leather Look B 1/2" X 11" Portfolio Item Color:Black Imprint/Logo:logo (art will be emailed) Imprint Color:White Imprint Size:3" x 5" Location:front	25	8.44	211.00
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!	<b>Total</b>	<b>\$289.00</b>
------------------------------	--------------	-----------------

**IMPORTANT NOTES & CONDITIONS**

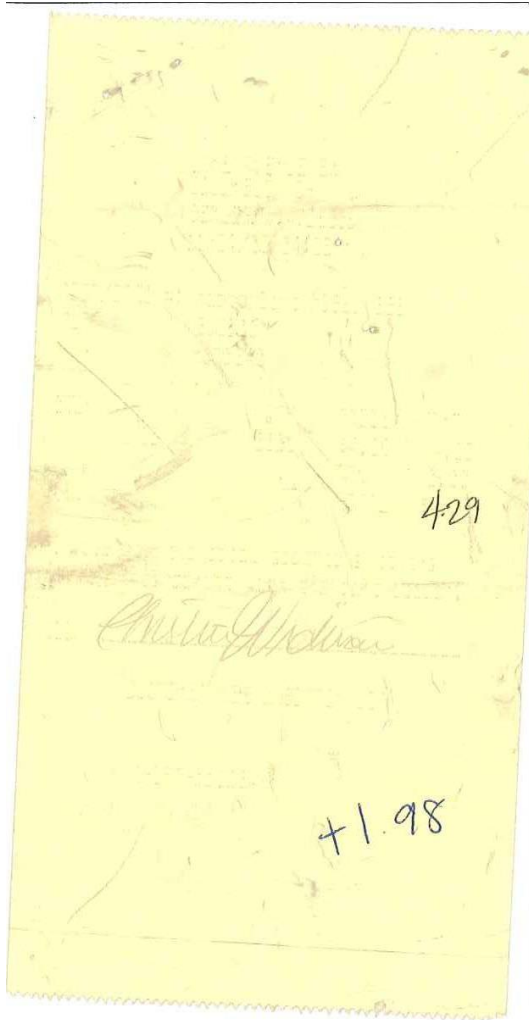
- DO NOT PAY FROM THIS SALES ORDER. YOU WILL RECEIVE AN INVOICE.
- Please review your sales order confirmation to make sure your order is correct.
- Check ship to address, delivery date, imprint information, and all other details.
- Production begins AFTER the art proof has been approved. Delays in approval will hold up production time and could result in additional charges.
- Any SHIPPING charges quoted are an ESTIMATE.
- Shipping prices are volatile and may be subject to change. One change is provided to the proof, after that changes will be subject to additional charges.
- Blank items are non-returnable and non-refundable.
- There is an order cancellation fee of \$25, and may be subject to others factory fees.

**Not Acceptable**

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



# Not Acceptable



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



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.

Invoice

Acceptable!

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

**Invoice Number:** 77380U  
**Invoice Date:** 4/15/11  
**Due Date:** 5/20/11  
**Event Name:** Bellwether Improv Festival  
**Reservation No.:** 95  
**Credit Card/100 W I ap** CSA funding

**Bookings / Details** **Price** **Amount**

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

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

*The Ohio Union appreciates your feedback and has created an online feedback form:  
[http://ohiounion.osu.edu/plan\\_an\\_event/contact/event\\_services\\_event\\_feedback](http://ohiounion.osu.edu/plan_an_event/contact/event_services_event_feedback)*

*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



# Top Five Things You Need to Know About Completing an Audit

1. Original, itemized receipts including proof of payment required
2. May need multiple documents to show that!
3. Audit forms found on the Ohio Union website
4. Operating and Programming audits have different due dates
5. Submit to Resource Room





# Questions about funding?

MacGregor Obergfell (Obergfell.1 @OSU.edu)

Fiscal Officer for Student Life

**Weekly office hours:**

**Mondays 1-2:30pm (Destination Ohio Room)**

**Thursdays 10:30am-12pm (Destination Ohio Room)**

**Visit [activities.osu.edu](https://activities.osu.edu) for updated office hours**



# Questions?



# President's Role: Registration Basics



# Registration Windows

## Two Registration Windows

Spring Window	February 15 – April 30
Autumn Window	August 1 – October 15

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



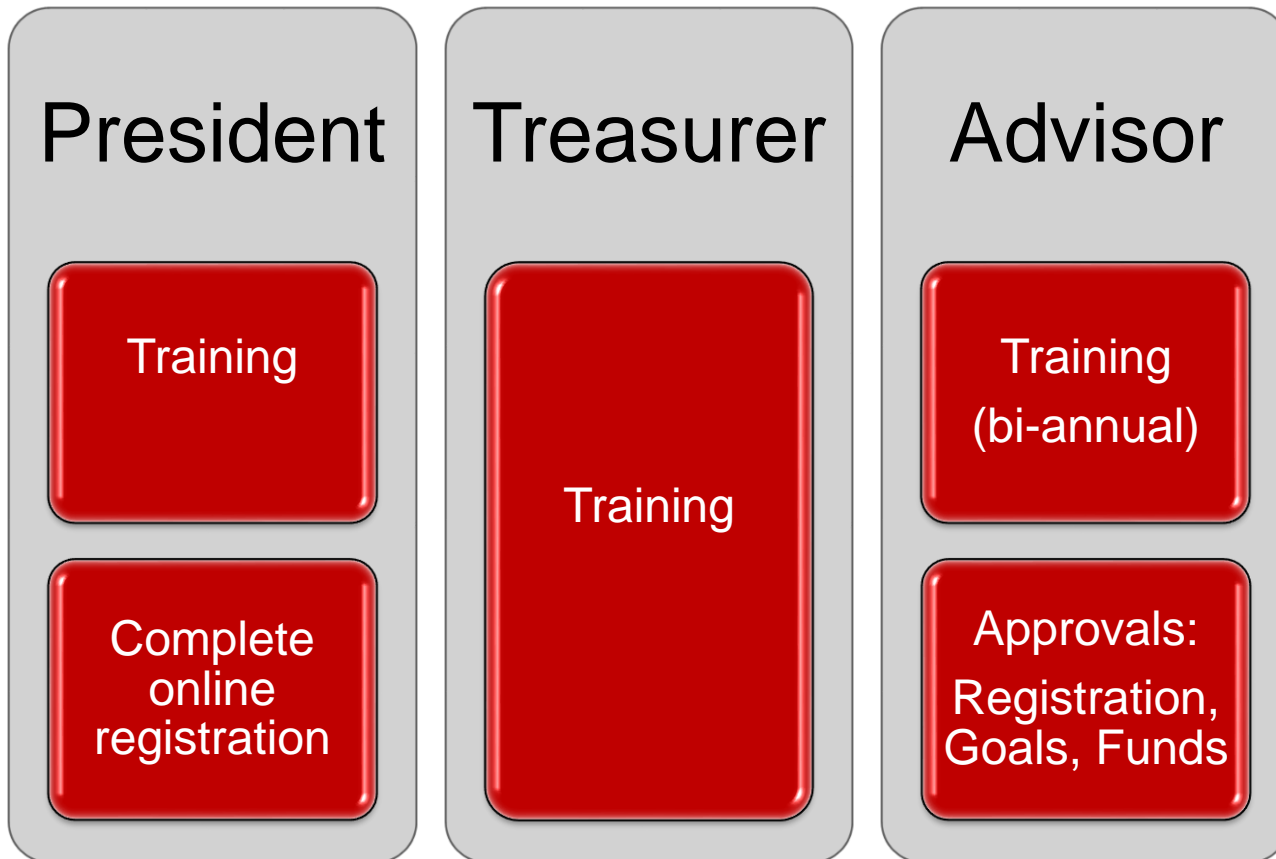
# Registration Windows

- Complete all your registration requirements during your organization's Window **each year**.

**\*Trainings completed outside of your registration window only apply to PREVIOUS registration window requirements.**



# Annual Registration Requirements





# Registration & Management

## Roster Page

Required:

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

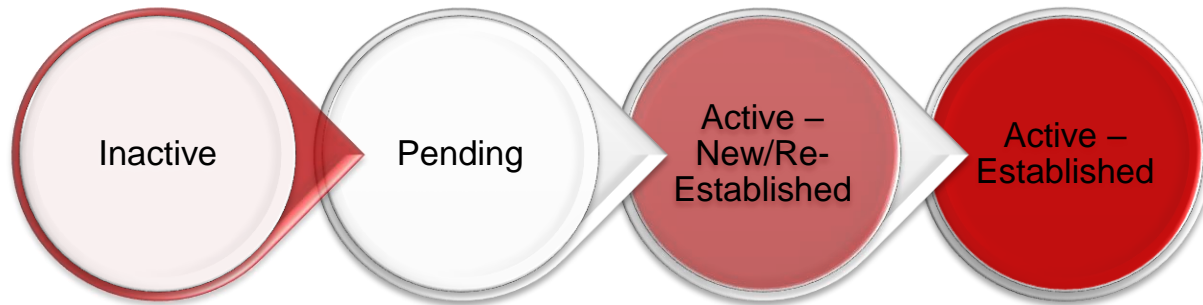
Must list first name, last name, lastname.# & email address – *enter carefully!*

- 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 & Management

## Registration Statuses



Organizations switch to **Pending** at the start of their Window





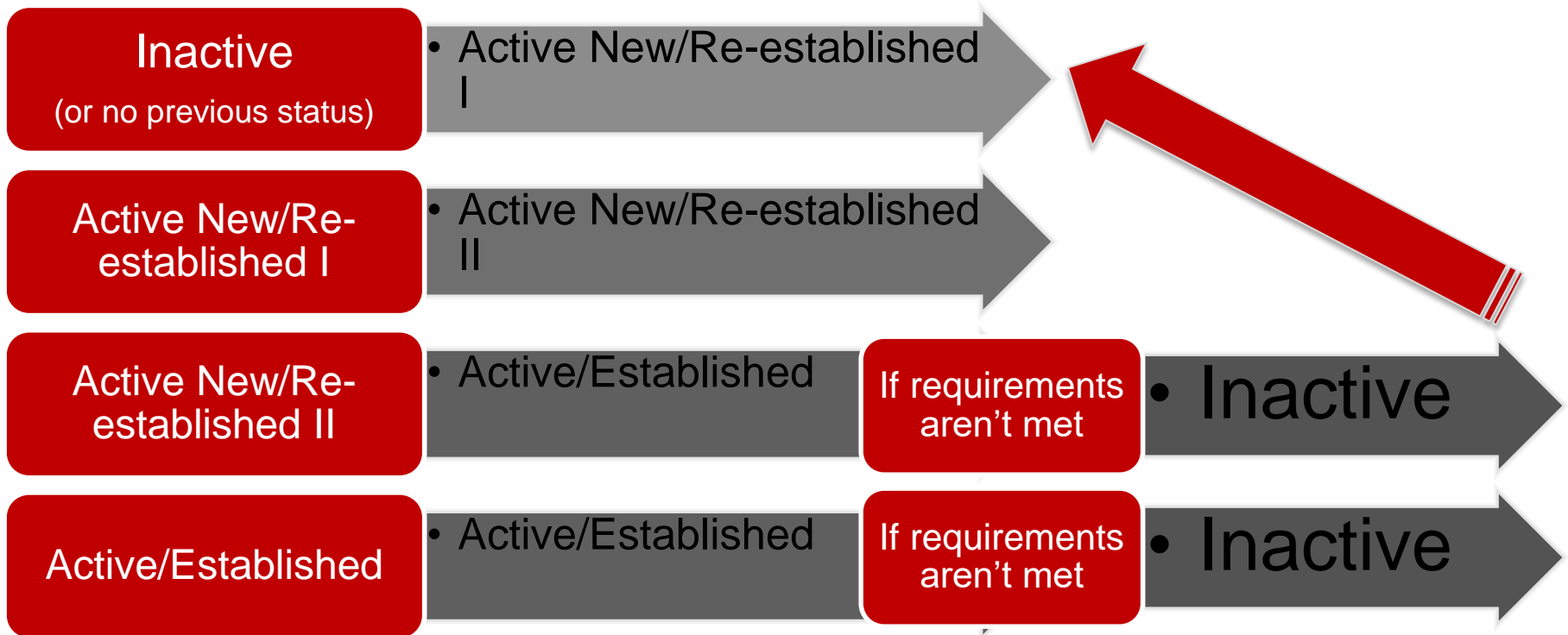
# Registration Statuses

Inactive	Organizations that have not completed all registration requirements by their registration Window deadline.  *Ineligible to use the free resources for student organizations.
Pending	Brand new organizations or organizations in the process of completing registration requirements.
Active – New/Re-established I or II	All registration requirements completed by the deadline; organizations that have been registered for less than 2 continuous years or have less than 15 members
Active - Established	All registration requirements completed by the deadline; organizations that have been registered for more than 2 continuous years and have at least 15 members



# Status Progression: Representation of end of window

If all requirements are met:





# Academic Requirements

## Minimum GPA Requirements for officers

Officer	Minimum GPA Required
Undergraduate	2.0
Graduate	3.0
Professional	2.0

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



# Academic Requirements

If these requirements are not met:

1 <sup>st</sup> semester	An email will be issued as a warning
2 <sup>nd</sup> semester	<b>Officer will be asked to find a replacement and step down</b>

You are a student first!

We want your involvement to be a complement to your experience at Ohio State.



# Clery Reporting

## *What is the Clery Act?*

The Clery Act is short for the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act, which is a federal consumer protection statute tied to a University's eligibility for Title IV funding. Non-compliance can lead to removal of active status and potentially the removal of federal funding for Ohio State University.

## *Why do I need to report this information?*

- Ohio State is required to contact Law enforcement authorities where Ohio State or its student organizations controlled property for a period of time.
- 'Control of property' is a broad definition that may apply to the off-campus activities or trips that student organizations sponsor.
- President of your organization will fill this report out



# Role of the President

## Online management system requirements

- Attend president's training
- Complete general information
- Enter goals
- Upload updated constitution
- Approve organization's roster
- Fill out Clery form about events

## Managing your organization

- Manage room reservations
- Utilize resource room line of credit
- Coordinate meetings and events
- Primary contact for organization
- Communicate with treasurer, officers, and members

## Preparing your organization for success

- Provide a vision for organization
- Help manage conflicts
- Ensure good morale and teambuilding
- Identify and prepare future leaders



# Role of the Advisor

## Requirements

Attend advisor training every 2 years

Approve registration, goals, and funding requests

Sign and upload indemnification letter online



## Leadership of Organization

Primary resource for the organization

Provide continuity, perspective, suggestions, and advice



# Advisors



All student organizations must have an advisor

- Must be an OSU faculty or staff member
- You may have more than one advisor



Graduate and professional students and civil service employees are not eligible

- may serve as co-advisors





# Questions about registration?

Center for Student Leadership & Service

[CSLS@OSU.edu](mailto:CSLS@OSU.edu)

Anna Fredendall – [Fredendall.7@osu.edu](mailto:Fredendall.7@osu.edu)

**Weekly office hours:** Mondays (1-2:30pm Coasters and Carnivals Room) Thursdays (10:30am-12pm Coasters and Carnivals room)



**THE OHIO STATE UNIVERSITY**

OFFICE OF STUDENT LIFE



# Resources for Operations



# Keith B. Key Center for Service and Leadership Resource Room

- Each student organization receives an annual **\$250 Line of Credit** to spend on resources.
- Line of Credit resets on the last day of your organization's registration Window OR when your organization is switched to active
- New organizations will receive a \$25 Line of Credit for their first 60 days of Pending status
- All members listed on an organization's roster can use the organization's Line of Credit, unless organization restricts.<sup>67</sup>

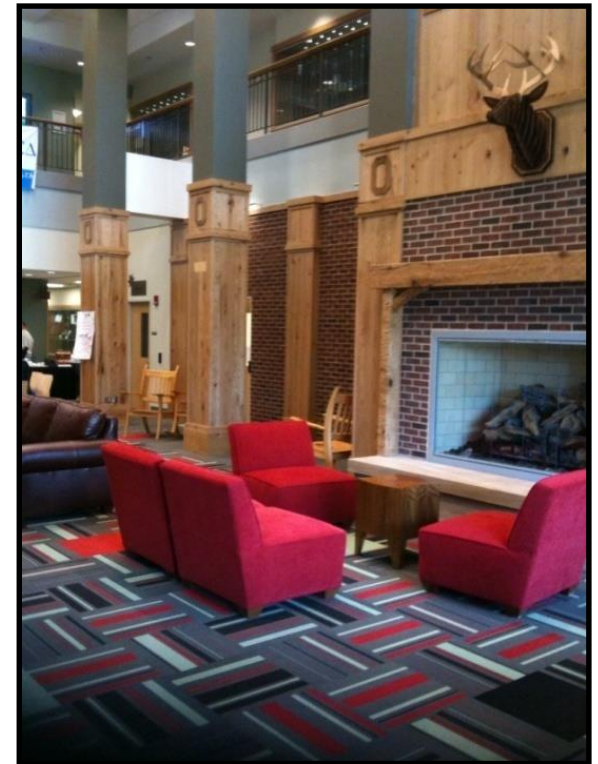


# Resource Room

- Only three primary officers may reserve and check out equipment
- When your Line of Credit runs out, if your status is Inactive, or whenever you desire, you can purchase items at their cost from the Resource Room
- Individuals can purchase items from the Resource Room



# Keith B. Key Center for Student Leadership & Service







# Keith B. Key Center for Student Leadership & Service

- Lounge
- Graphics Department
- Video Department
- Meeting Rooms
- Office Space & Lockers
- Leadership Library







# Offices & Lockers

- Student organizations have access to office spaces and storage lockers.
- Student organization mail can be addressed to the Ohio Union Resource Room and picked up.







# Resource Room



Variety of supplies for student orgs and individual users

\$250 line-of-credit for Active student orgs



## *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



# Technology Resources

- Website hosting – sign up through registration on ‘Org Info’ page
  - » Currently, no website hosting is available
  - » Transitioning to a new website hosting service
  - » Look for updates this Spring!
- Organization email listservs are managed by OCIO.
- Organization email addresses (myorgname@osu.edu) are also managed by OCIO.
  - Only your advisor can fill out the online request form for these resources



# Resources

## Utilize our website!

[Using University Trademarks](#)

[Traffic and Transportation Management](#) Student organization and travel

[Swank](#): Purchase rights to show movies at your event

[UniPrint](#): Printing large posters or signs on campus

[Archives](#): help to make your organization a part of Ohio State's history

[Hazing and alternatives to hazing](#)

[Alcohol Policy](#)

[Diversity & Inclusion](#)

[Suicide Prevention](#)

[Sexual violence education and support](#)

[Activities and Programs with Minor Participants Policy](#)



# Utilize our website:

[http://activities.osu.edu/involvement/student\\_organizations/resources/](http://activities.osu.edu/involvement/student_organizations/resources/)

**STUDENT ACTIVITIES**

THE OHIO STATE UNIVERSITY  
OFFICE OF STUDENT LIFE  
Creating The Extraordinary Student Experience →

About Us + Involvement + Programs and Events + Contact Us

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](#)



# Student Organization Staff

**Johnnie Jordan** – Coordinator for the KBK Center for Student Leadership & Service

*Resource Room & Center spaces*

[Jordan.597@osu.edu](mailto:Jordan.597@osu.edu)

**Anna Fredendall** – Coordinator for Student Involvement

*Registration and Training*

[Fredendall.7@osu.edu](mailto:Fredendall.7@osu.edu)

**Lindsay Marx**– Business Development Coordinator

*Student Organization Funding*

[Marx.78@osu.edu](mailto:Marx.78@osu.edu)

**General Student Organization Questions–**

[CSLS@OSU.edu](mailto:CSLS@OSU.edu)



# Wrap-Up

## For future reference

- Email with links and presentation slides
- Roadmap for Success

## Before you leave

- Sign the sign-in sheet!
- Stop by the Resource Room