STUDENT ORGANIZATION OFFICER TRAINING for Treasurers

The Ohio State University
Office of Student Life
Student Activities
Goals for Today’s Session

- Share practices of fellow treasurers
- Access leadership resources
- Ask questions, share ideas
Expectations for Today’s Session

- Sign in
- Slides will be emailed
- Ask questions
- Use your handout
- Participate!
Student Org Guidance

• Know where to find information and support:
  
  • Safeandhealthy.osu.edu – campus-wide information
  
  • Go.osu.edu/StudentOrgGuidance – interpretations for student organization operations. Will be updated as-needed.
  
  • Go.osu.edu/StudentOrgHome – contact information for the Student Org Team and Coaches
The Latest Updates

Go to go.osu.edu/Autumn2020FAQ

For information about the current campus policies, requirements, and recommendations related to COVID-19 and student organization operations.
Meeting and Programs

• Virtual meetings and programs are strongly encouraged
• On-campus space reservations are not yet available
Registration and Funding

• Registration requirements are the same, extensions are available
• Operating and Programming Funds are available
• Additional funding considerations:
  • *Travel*
  • *Food*
  • *Virtual programming*
  • *Safety guidance*
Accountability & Consequences

• Both the organization and individual students can be held accountable under the Code of Student Conduct
  • *Loss of org recognition, individual suspension*
• Reduce your risk by being a good steward
• Consider updates to the org Constitution
• Report behavior to go.osu.edu/conductcomplaint
ONLINE TRAINING

Key Roles

Funding and Finances

Registration Basics

Resources
Online Training Key Points

1. What are the **two sources of funding** available from CSA?
2. When are **audits due** for those funding sources?
3. What can student orgs access in the **Resource Room**?
4. What is the **deadline** to complete your registration requirements?
Student Org Guidelines

• Guiding principles
• Registration process
• Responsibilities of student orgs
• Funding guidelines
• Allowable expenses for Operating and Programming Funds
• Much more!
Student Organization SUCCESS FRAMEWORK

Member Development
Leadership Capacity and Confidence | Social Perspective Taking | Wellness

Organization Operations
Purpose and Goals | Membership Recruitment and Retention
Budgeting and Financial Management | Fundraising and Philanthropy
Programming | Leadership Transitions | Self-Governance
Operational Efficiency | Collaboration | Responsiveness and Innovation
Diversity and Inclusion | Risk Reduction | Advisor Partnerships

Community Engagement
Connection to Student Organizations | Affinity with the University
Commitment to Social Change
Student Organization Coaches

Coaches can help your student organization

- Solve problems and connect with resources
- Set goals using the Success Framework
- Collaborate with fellow leaders
- Get support for member recruitment, leadership transitions, budgets and more
Member Development

Leadership Capacity and Confidence, Social Perspective Taking, Wellness
Student Organization SUCCESS FRAMEWORK

Leadership Capacity and Confidence

The development of members’ self-awareness of their personal values and skills, as well as their belief that they will be successful when engaging in leadership behaviors.
Leadership Capacity and Confidence

Greatest strengths

Areas for growth

How will your strengths help you succeed as a leader?

How will your role help you grow as a leader?
Resources

- Student Leadership Advocates Workshops
- MCC Education and Training Programs
- Student Organization Success Coaches
- Leadership Education Needs Assessment (LENA)
Organization Operations

Purpose and Goals, Membership Recruitment and Retention, Budgeting and Financial Management, Fundraising and Philanthropy, Programming, Leadership Transitions, Self-Governance, Operational Efficiency, Collaboration, Responsiveness and Innovation, Diversity and Inclusion, Risk Reduction, Advisor Partnerships
Student Organization

SUCCESS FRAMEWORK

Budget and Financial Management

The ability to be financially self-supporting with a well-developed budget that reflects the current and future priorities of the organization
Eligibility for CSA Funding

You may apply for funds regardless of your organization status – Active, Pending, Inactive
Changes to CSA Funding

Operating Funds
No travel through 12/31/20

Programming Funds
Virtual and in-person programs are accepted
Food is discouraged
No travel through 12/31/20
Changes to CSA Funding

Purchases that do not comply with safety guidance provided by the university and/or CSA may not be reimbursed
Operating Funds

Very flexible, for use in daily operations

Apply between July 1 and April 1

Funds issued in advance

$200 annually

Submit audit, receipts and unused funds by May 1
Operating Expenses

- Advertising
- Promotional
- Printing
- National Dues Fees
- Travel and Transportation
- Bank Charges
- Checks
- Membership Awards
- Equipment Costs
- Facility Rental Fees
- Books Subscriptions
- Office Supplies
- Membership Awards
- Office Supplies

Up to $100 on food for recruitment events
Programming Funds

For use only with eligible programs

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

Apply by one of 5 deadlines, depending on program date

Funds issued on a reimbursement basis

Submit audit and receipts within 30 days of your event
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
Programming Funds

Eligible programs must be:

• Educational or service activity
• Held on-campus
• Open to all fee-paying students
• Broadly marketed
Programming Funds

**Ineligible** programs include:

- Meals
- Organization recruitment
- Meetings
- Academic program requirement
- Religious or worship services
- Political or lobbying activities
- Tabling
<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 1</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>
You are currently logged in as the General Member for Ski and Board Club at OSU.

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
Fundraising and Philanthropy

The utilization of creative and effective practices to raise funds for the organization, as well as skills for purposeful charitable giving
Fundraising Ideas

- Alumni Base
- Sell t-shirts
- Campus Parc
- Food/Bake sales
- Restaurant nights
- Schottenstein Center Cleanups

*No spending restrictions on money you raise*
Fundraising and Philanthropy

- What are examples of successful fundraising your organization has tried?
- What are some challenges your organization has experienced when it comes to fundraising?
- Does your organization engage in philanthropy? If so, what type of philanthropy work do you do?
Operational Efficiency

The procedures and processes for regular, efficient, and effective organizational function
Submitting an Audit

For Operating and Programming Funds
Audit forms can be found on Student Activities website

Original, itemized, legible receipts
Must show proof-of-payment and exactly what was purchased

Submit to Resource Room
It's okay if actual expenses vary from the original application
Your Organization’s Information

### 2018-2019 CSA Allocations
Programming Funds Audit Form

Due to the Center for Student Leadership and Service (Room 2095) in the Ohio Union, attn: Angela Britton 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.

Full Student Organization Name: 

Title of Program: 

Date of Program: 

Location 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 2018-2019 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.

<table>
<thead>
<tr>
<th>Source(s)</th>
<th>Net Amount for organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex. Veimo/Paypal/Undergraduate Student Government</td>
<td>Ex. $300</td>
</tr>
</tbody>
</table>

### Expenses

**Category**

<table>
<thead>
<tr>
<th><strong>Ex. Entertainment</strong></th>
<th><strong>Vendor(s)</strong></th>
<th><strong>Amount Spent</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex. SouthWest</td>
<td>Mr. Brutus</td>
<td>$200</td>
</tr>
<tr>
<td></td>
<td>Staples</td>
<td>$45.87</td>
</tr>
</tbody>
</table>

**Explanation**

- Ex. Speaker Flight
- Speaker Fee (waived)
- Printer cartridge, nametag

**Audited Amt. [Office Only]**

**Program Income (if any)**

**Program Expenses + Receipts**
But…

Acceptable
Receipt

Each item purchased is listed separately and lists each unit price along with total

But…
P*ps* products not a fundable item!

Only Coca-Cola products will be reimbursed!
Acceptable! You may need multiple documents to show itemization and proof of payment.

---

Run Summary

Driver: Dustin J Lasko

Total Orders: 1
Total Sales: 114.50

Proof of payment
<table>
<thead>
<tr>
<th>Charges</th>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>4/21/2011</td>
<td>$15.00 per wireless mic. rented 2 mics</td>
<td>$30.00</td>
<td>$30.00</td>
</tr>
<tr>
<td>Payable</td>
<td>4/21/2011</td>
<td>Invoice paid by: $30.00 , receipt: 1-55946958 -- usage fee</td>
<td>$30.00</td>
<td>$30.00</td>
</tr>
</tbody>
</table>

Terms: 

OSU OCIO IT SERVICE DE
2009 MILLIKIN RD
COLUMBUS, OH 432100000

04/21/2011 08:46:06
Merchant ID: 000000000058294
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@robyndhs.com
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
## Sales Order

**Bill To**

Jessica Ly  
2905 Ontario St.  
Columbus OH 43224

**Ship To**

Jessica Ly  
2905 Ontario St.  
Columbus OH 43224

<table>
<thead>
<tr>
<th>Terms</th>
<th>Customer PO #</th>
<th>Sales Rep</th>
<th>In Hands Date</th>
<th>Production Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Card</td>
<td>157431 online</td>
<td>Meagan Clark</td>
<td>4/7/2011</td>
<td>RUSH</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>US1 Item #</th>
<th>Description</th>
<th>Qty</th>
<th>Rate</th>
<th>Amount</th>
</tr>
</thead>
</table>
| Partitions Customize | 8241255 | Promotional Leather Look 8 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  
Set-Up Charges  
Estimated Shipping: May result in additional charges (ground) | 25 | 8.44 | 211.00 |
| Set-Up Chgs Shipping: Shipping | | | 1 | 0.00 | 0.00 |

Thank you for your order Ly!

**Total**  
$289.00

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### 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

**Illegible** – this org 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

<table>
<thead>
<tr>
<th>Client</th>
<th>Invoice Number: 773800</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edward Greenblatt</td>
<td></td>
</tr>
</tbody>
</table>
8th Floor Improv Comedy Group  
109 Morrison Tower  
CAMPUS | 

<table>
<thead>
<tr>
<th>Invoices can be paid directly</th>
</tr>
</thead>
</table>

Acceptable!

**Invoice**

**Ohio Union and RPAC**

**Invoices can be paid directly**

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**Ohio Union Event Services**  
2008 Ohio Union  
1739 North High Street  
Columbus OH 43210  
Phone 614-292-5200 / Fax 614-292-1816

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**Please pay directly.**

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**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

<table>
<thead>
<tr>
<th>Room Charge:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less 50% Discount</td>
</tr>
<tr>
<td>Ohio Union Equipment:</td>
</tr>
<tr>
<td>A/V Equipment:</td>
</tr>
</tbody>
</table>

6:00 PM - 11:30 PM Standard

| Microphone - Wireless - US Bank Conference Theater  
| Less 50% Discount |  
| Lighting Console - Conference Theater |  

---

<table>
<thead>
<tr>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>500.00</td>
<td>500.00</td>
</tr>
<tr>
<td>-250.00</td>
<td>-250.00</td>
</tr>
<tr>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>-37.50</td>
<td>-37.50</td>
</tr>
<tr>
<td>150.00</td>
<td>150.00</td>
</tr>
</tbody>
</table>

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**Users of the Ohio Union for event purposes must submit full payment of fees no later than the 30th day from the receipt of the event invoice.**

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

The Ohio Union appreciates your feedback and has created an online feedback system:

http://ohioune.osu.edu/plan_an_event/contact/event_services_event.html

**Thank you!**
Top Five Things to Know About Completing an Audit

1. **Receipts** must be original, itemized, legible, and show proof of payment
2. **Multiple receipt documents** may be required
3. **Audit forms** found online:
   - Student Activities > Student Organizations > Funding
4. Operating and Programming Funds audits have **different due dates**
5. Submit audits to, and pick up checks from, the **Resource Room**
KBK Center, Resource Room

$250 line-of-credit

Variety of resources, supplies, games, equipment, etc.
Risk Reduction

The assessment and reduction of accidental harm or loss through proactive safety measures and response plans.
Risk Reduction

- Keep expenditures up-to-date
- Mail, audits, and bank statements
- Who’s on record?
- Cash handling
- Transition bank account and EIN
Resources

- Office Hours
- Coca-Cola Product Donation
- OUAB, Student Governments, and other campus collaborators
- Your bank
Upcoming Events and Deadlines
Registration and Funding Deadlines

Autumn Registration Window: October 30

Programming Funds: September 1
• For events taking place October 16-December 31

Programming Funds: November 1
• For events taking place January 1-March 15
Programs

Go to go.osu.edu/StudentOrgPrograms

For current program offerings like:
- Student Org Essentials
- Student Involvement Fair information
- Advisor Roundtables
Questions and Follow-up
Resource Webpage

STUDENT ACTIVITIES

Resources

Events | Funding | Fundraising | Marketing | Student Organization Success Framework | Registration | Risk Reduction | Technology | Training | Travel | Successful Leadership | Additional Resources

Registration

Student Organization Management System Tutorial Videos

For Presidents

For Advisors (spring 2018)

How to Apply for Operating Funds (spring 2017)

How to Apply for Programming Funds (spring 2017)

Other Registration Resources

Student Organization Guidelines (05/01/2018)

Sample Constitution

Advisor Indemnification Letter Template (docx)
Next Steps

1. Complete Online Training (if not done already)
2. Check out website (activities.osu.edu)
3. Review the Framework
4. Connect with, or request, a Coach
Thank You for Attending

Before You Leave:
Sign attendance sheet

Following Today’s Training:
Confirmation email with links/ resources
Access resources at activities.osu.edu

Contact Us:
csls@osu.edu