

The Oval Financial Forum

Student Organization Constitution

ARTICLE I. NAME OF ORGANIZATION

The Oval Financial Forum (OFF)

ARTICLE II. ORGANIZATION PURPOSE

The Oval Financial Forum provides members with a merit-based environment to develop expertise in macroeconomics, geopolitics, and financial markets. Through the discipline of financial writing and research, members build the analytical skills needed to contribute to a monthly publication and to think more clearly about the world.

ARTICLE III. UNIVERSITY REGULATIONS

Section A. Harassment and Discrimination, including Sexual Misconduct

The Oval Financial Forum *agrees that it will not engage in sexual misconduct nor any harassment or discrimination on the basis of age, ancestry, color, disability, gender identity or expression, genetic information, HIV/AIDS status, military status, national origin, race, religion, sex, sexual orientation, protected veteran status or any other basis in accordance with the Student Organization Registration Guidelines.*

Section B. Hazing

The Oval Financial Forum *agrees to maintain a zero-tolerance policy for hazing, in compliance with Ohio State University and Collin's Law. All members must conduct themselves in a manner that supports an environment free from hazing. Hazing includes any activity, regardless of consent, that causes or creates a substantial risk of physical, mental, or emotional harm or humiliation to any individual as part of membership or affiliation with the student organization. If found responsible for hazing, members and/or the organization may face disciplinary actions.*

Section C. Bylaws

The Oval Financial Forum *retains the right to maintain separate bylaws to outline the day-to-day operations of the organization and to clarify policies and procedures otherwise not included in the previous articles. Bylaws and/or other guiding documents may not take precedence over the requirements set forth by local, state, and federal laws, The Ohio State University's regulations, policies, and procedures, and the Council on Student Affairs (CSA) Student Organization Registration Guidelines. Organizations may make amendments and changes to the bylaws without consulting the Ohio Union & Student Activities department, and changes to bylaws do not require approval. All elements of organizational bylaws shall be consistent with the organization's currently approved constitution on file and CSA constitution requirements.*

ARTICLE IV. MEMBERSHIP

Section A. Membership Eligibility

Membership in the Oval Financial Forum is open to full-time undergraduate students enrolled at the Columbus Campus of The Ohio State University who maintain a minimum cumulative GPA of 3.0. Students currently on academic probation are ineligible regardless of their cumulative GPA. Students who meet these criteria are eligible to apply for membership through the forum's competitive selection process.

Section B. Member Selection

Admission to the Oval Financial Forum is a competitive, merit-based process designed to identify students with a strong aptitude for financial analysis. Prospective members are required to attend one of the forum's scheduled informational sessions; as a last resort, if a prospective member is unable to attend any scheduled session, a formal exemption may be granted by any Executive Board member. Following the informational session, prospective members must submit a formal application consisting of a current professional resume and a written response to a designated prompt regarding market trends or macroeconomics. The Executive Board will convene to review each application, during which a majority vote is required for a candidate to advance to the interview stage. Candidates who advance shall participate in one formal round of interviews, evaluated by members of the Executive Board based on technical knowledge, communication skills, and demonstrated commitment to the forum's mission. Following the interview process, the Executive Board will convene for a second meeting in which interviewers present their evaluations and notes on each candidate, after which a final vote will be conducted; a two-thirds (2/3) vote of all seated Executive Board members is required to grant membership.

Section C. Membership Timeline

Recruitment takes place at the start of the autumn and spring semesters. The forum shall hold multiple informational sessions at the start of each recruitment period, and the formal application window shall remain open for no fewer than ten (10) business days following the final informational session. The full recruitment and application process shall be completed within four to six (4–6) weeks of the start of the semester. Following the application review period, candidates selected to advance will be notified and scheduled for interviews within a reasonable timeframe as determined by the Executive Board. Following the conclusion of all interviews and the membership vote, admitted members enter a mandatory development phase of approximately eight (8) weeks that includes technical orientation workshops, access to the forum's digital learning curriculum, and weekly in-person sessions covering macroeconomic concepts and financial writing. Throughout the program, new members are paired with and shadow an experienced officer or active member to learn the forum's research methods and editorial standards. Development concludes with the submission of practice drafts of newsletter segments, which are reviewed and scored by the Executive Board using a standardized rubric. Upon successful completion of all development phase requirements, members are granted active status and begin

contributing to the forum's monthly publication, with Executive Board eligibility requirements outlined in the Officer Eligibility section.

Section D. Member Removal

The Executive Board reserves the right to remove any member who fails to uphold the standards of the Oval Financial Forum. Grounds for removal include falling below the cumulative 3.0 GPA requirement, consistent absence from weekly sessions, or a lack of contribution to monthly publications and merit-based learning assignments. A concern regarding any member may be formally introduced by any general member or member of the Executive Board and must be brought to the attention of the President.

Regarding attendance, a member who misses four (4) consecutive weekly sessions or accumulates six (6) total absences within a single semester shall be automatically brought before the Executive Board for a formal review. Upon the introduction of any concern or upon a member reaching either attendance threshold, the President must reach out to the member in question within one (1) week of becoming aware of the issue. Following that outreach, the Executive Board shall convene for a formal review to determine whether to move the member to inactive status. A simple majority vote of the seated Executive Board is required to move a member to inactive status, and the affected member must be notified and given a reasonable opportunity to meet with the Executive Board before any further action is taken. A member placed on inactive status shall enter a two (2) week probationary period during which their attendance, contributions, and assignments will be closely monitored by the Executive Board. At the conclusion of that two (2) week period, the Executive Board shall reconvene to evaluate the member's progress. A simple majority vote shall then determine whether the member is to be removed from the forum or restored to active standing. Any member moved to inactive status a second time shall be officially removed from the forum's roster without the possibility of reinstatement for the remainder of that academic year.

ARTICLE V. ADVISOR

Section A. Advisor Duties and Responsibilities

The advisor for the Oval Financial Forum must be a full-time member of the University faculty or Administrative and Professional staff. The advisor is responsible for fulfilling all minimum requirements established by the Council on Student Affairs, which include completing advisor training every two years, completing the anti-hazing training module available through BuckeyeLearn or stophazing.osu.edu, submitting online approval of the organization's registration and goals every year, approving any CSA Operating or Programming funds requests initiated by the organization's Treasurer, following all applicable laws, regulations, and university policies, and completing all relevant reporting obligations. The advisor is encouraged to attend at least one general meeting per semester, if availability permits, to introduce themselves to the membership and share relevant professional experience. The advisor may also, at their discretion, participate as a member of the review board to provide oversight and feedback on the forum's publications and assessments. The advisor may not vote or hold office within the organization.

Section B. Advisor Term

The advisor shall serve a term of one academic year, beginning at the start of the autumn semester and concluding at the end of the spring semester. Renewal requires a majority vote from the Executive Board and mutual agreement from the advisor, confirmed no later than two (2) weeks before the end of the spring semester. If the advisor fails to consistently fulfill their obligations, the President shall initiate a conversation with the advisor before any further action is considered by the Executive Board.

Section C. Advisor Selection

The President or any Executive Board member may introduce a candidate recommendation for the advisor role. A majority vote of the Executive Board is required to move forward with outreach to a recommended candidate. Candidates should have a professional or academic background in finance, economics, writing, journalism, or a related field, and a demonstrated willingness to support the forum's mission. Following a majority vote to proceed, the President shall schedule and conduct a meeting with each prospective advisor to discuss the role and assess mutual fit. Following that meeting, the President shall present their findings to the Executive Board. If there is only one candidate, a majority vote of the Executive Board is required to formally appoint them as advisor. If there are multiple candidates, the Executive Board shall vote on all candidates and the candidate who receives the highest number of votes shall be appointed. In the event of a tie, the candidate with the fewest votes in the first round shall be eliminated and a runoff vote shall be held between the remaining candidates until one is selected. For all candidates who are not appointed, the Executive Board shall hold a majority vote to determine whether each unselected candidate should be offered a secondary advising role or a position on the forum's editorial review board.

Section D. Advisor Replacement

If any Executive Board member raises a concern regarding the advisor's commitment to the forum and its mission, a majority vote of the Executive Board will result in the President scheduling a one-on-one conversation with the advisor within two (2) weeks. Following that conversation, the Executive Board shall reconvene two (2) weeks later to reassess the situation and hold a final vote. If a two-thirds (2/3) vote of the Executive Board determines that concerns remain unresolved, the advisor shall be removed, after which the President shall notify the advisor immediately. In the event of a serious or urgent concern, the Executive Board reserves the right to bypass the standard review process and move directly toward removal or replacement, provided a majority vote of the Executive Board is obtained. In the event of a mid-year removal, the President must identify and present at least one qualified candidate to the Executive Board within one (1) week of the advisor's departure. A majority vote of the Executive Board is required to appoint the replacement, and the full selection process outlined in Section C shall be expedited accordingly. If the removal occurs at the end of the academic year, reselection shall follow the standard guidelines established in Section C of this Article.

ARTICLE VI. ORGANIZATION LEADERSHIP

Section A. Officer Positions

For university registration purposes, the President serves as Primary Leader, the Senior VP of Operations serves as Secondary Leader, and the VP of Finance & Strategy serves as Treasurer.

The Executive Board (E-Board) shall consist of the following officers, tasked with overseeing the strategic direction, content quality, and administrative health of the Oval Financial Forum:

- **President:** Serves as the primary leader of the organization. The President oversees all forum functions, facilitates executive meetings, ensures all roles are fulfilling their duties, and acts as the chief liaison between the forum and the University.
- **VP of Finance & Strategy:** Manages the organization's budget, fundraising initiatives, and long-term strategic growth. This officer is responsible for all financial reporting and ensures the forum remains in good standing with university funding requirements.
- **VP of Marketing & Fundraising:** Leads the forum's public image and outreach. Responsibilities include managing social media accounts, coordinating marketing campaigns to attract new members/subscribers, and executing fundraising events.
- **Editor-in-Chief:** Acts as the final authority on all published content. This officer performs the final checks on all monthly newsletters, ensuring technical accuracy, professional tone, and overall quality before public distribution.
- **VP of New Member Development:** Manages the recruitment timeline and the mandatory member development process. This officer coordinates the technical orientation workshops and the mentorship program to ensure new recruits meet the forum's standards.
- **VP of Research:** Establishes the framework for how the club conducts research. This includes vetting credible sources, maintaining the internal research database, and overseeing the research initiatives for each newsletter cycle.
- **Senior VP of Operations (OPS):** Provides operational support across all departments, manages internal communications, and ensures that weekly meeting plans and administrative tasks are executed efficiently.
- **VP of Copy & Standards:** Focuses on brand consistency and editorial flow. This officer ensures that all writing adheres to the forum's specific style guidelines and maintains a high standard of professional journalism across all sectors.

Section B. Officer Eligibility

To run for an executive position within the Oval Financial Forum, a candidate must be an active member who has successfully completed the full member development process, maintains a minimum cumulative GPA of 3.0, has completed at least one full semester of membership prior to the election period, and has never been placed on inactive status. For clarity, the semester in which a member completes the new member development process counts toward this requirement, meaning a member initiated in the fall semester is eligible to run for office in the following spring, but a member initiated in

the spring semester is not eligible to run for office during that same semester. Per university requirements, the President and Treasurer must complete all mandatory university leadership training to ensure the organization remains in compliance and active on campus.

Section C. Officer Selection Process

The Executive Board is elected annually by the active membership later in the spring semester (March–April). Eligible members may self-nominate or be nominated by any Executive Board member. Prior to the presentation meeting, all candidates must be approved by a majority vote of the Executive Board to formally appear on the ballot, ensuring that those who advance are prepared and committed to the responsibilities of the role. A dedicated meeting shall be held at which each approved candidate will present themselves to the general membership and identify the role they are seeking. A separate ballot shall be held for each officer position within one (1) week of the presentation meeting, and the candidate with the greatest number of votes for each position shall assume that role for the following academic year. In the event of a tie, the outgoing Executive Board shall vote to determine the winner. If that vote also results in a tie, the outgoing President shall cast the deciding vote. Incoming officers shall assume their roles at the start of the autumn semester, with the outgoing Executive Board remaining available to support the transition over the summer.

Section D. Officer Removal

An officer may be removed from their position if they fail to uphold the duties of their role, violate university policy, or fall below the required 3.0 GPA. In the event that the concern involves the President, the Treasurer shall assume all responsibilities assigned to the President throughout the removal process. In the event that the President resigns, becomes incapacitated, or is otherwise unable to fulfill the duties of the role mid-year, the Treasurer shall assume the presidency for the remainder of the academic year. The removal process may be initiated by any Executive Board member who raises a concern, or by a petition signed by no fewer than one-third (1/3) of the active membership. In either case, the concern shall be brought to the President, who shall schedule a private Executive Board meeting to discuss the matter without the officer in question present. Following that discussion, a majority vote of the Executive Board is required to move forward with the removal process. The officer in question shall then be notified and given a reasonable opportunity to address the concerns before the Executive Board. To finalize the removal, both a two-thirds (2/3) vote of the Executive Board and a simple majority vote of the active membership must be obtained. Both thresholds must be met independently; failure to reach either shall result in the removal process being dismissed. Upon confirmed removal, the President shall identify a pool of one to five (1-5) candidates for the vacant role within ten (10) days, with the Treasurer assuming this responsibility in the event of the President's removal. Each candidate must receive a majority vote from the Executive Board to be moved into consideration by the general membership, with a maximum of three (3) candidates advancing. The general membership shall vote, and the candidate with the greatest number of votes shall be appointed to fill the vacancy for the remainder of the academic year. In the event of a tie, the Executive Board shall cast a deciding vote. If that vote also results in a tie, the President shall cast the deciding vote, or the Treasurer in the event the President is the officer being removed.

ARTICLE VII. ORGANIZATION DISSOLUTION

Section A. Dissolution Requirements

Dissolution may be considered in the event of a sustained lack of member interest, inability to secure a qualified advisor, or a shift in university policy that renders the forum's mission unfeasible. Any Executive Board member may call a dissolution meeting to discuss the future of the forum. Following that discussion, a second meeting shall be held within one (1) week, at which a three-fourths (3/4) vote of the Executive Board is required to advance dissolution. If the Executive Board votes to proceed, a three-fourths (3/4) majority vote of the active membership at a subsequent meeting is required to formally dissolve the organization. The membership vote may not be held at the same meeting in which it is introduced.

Section B. Dissolution Procedures, including Assets and Debts

Upon a successful dissolution vote from the general membership, the Executive Board shall convene within one (1) week to determine the allocation of any remaining assets and address any outstanding debts. Any remaining university funds must be returned in accordance with university policy. Any remaining assets generated through independent fundraising or private donations shall be donated to a nonprofit or university fund focused on financial literacy, as determined by a majority vote of the Executive Board at that meeting. If outstanding debts exist, a majority vote of the Executive Board is required to approve any fundraising effort or debt repayment plan prior to the organization's official closure. The President and Treasurer shall then oversee the wind-down of all remaining club activities and notify the Ohio Union and Student Activities staff to remove the organization from the official registry.

ARTICLE VIII. CONSTITUTIONAL AMENDMENTS

Section A. Amendment Process

Any active member or officer may propose an amendment to this constitution. The proposal shall be submitted to the Executive Board, who shall review and discuss it at a private Executive Board meeting held within two (2) weeks of the proposal. A majority vote of the Executive Board is required to advance the amendment to the general membership. The amendment may not be voted upon at the same meeting in which it is introduced to the membership. A two-thirds (2/3) vote of the active membership is required to adopt the amendment. Once approved, the amended constitution shall be submitted to the university for review within thirty (30) days. Unless otherwise specified, all amendments take effect at the beginning of the following academic semester.