Student Organization
President Training

2015-2016
Introductions
Role of Officers
Registration basics
Discussion
Recap and Questions
What do you feel is your role as the president?
Role of the President

Online management system requirements
- Attend president’s training
- Complete general information
- Enter goals
- Upload updated constitution
- Approve organization’s roster

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
- Public face of organization

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 President

Complete registration requirements

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

- Approve all spending
- Chief Financial Officer
- Financial Wellness
- Request Funds
- Maintain Records
- Collect Dues
Role of the Advisor

Requirements

- Attend advisor training every 2 years
- Approve registration, goals, and funding requests
- Co-sign on a bank account for organization

Leadership of Organization

- Primary resource for the organization
- Provide continuity, perspective, suggestions, and advice
Annual Registration Requirements

President
- Training
- Complete online registration

Treasurer
- Training

Advisor
- Training (bi-annual)
- Approvals: Registration, Goals
President’s Role: Registration Basics
### Registration Windows

**Two Registration Windows**

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

- 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.
Ohio Union Website and Student Organization Management Site

Log in to the management site:
http://ohiounion.osu.edu/get_involved/student_organizations

What you will learn in this video:

<table>
<thead>
<tr>
<th>How to:</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>
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, last name.# & 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

Constitution Requirements

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

Goals Page

• Describe a minimum of 2 goals for the year
• May submit as many goals as you would like
• What is a S.M.A.R.T. goal?

Specific

Measurable

Attainable

Relevant

Timely
Registration & Management

Registration Statuses

Organizations switch to **Pending** at the start of their Window
# Registration Statuses

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

If these requirements are not met:

<table>
<thead>
<tr>
<th>1st semester</th>
<th>An email will be issued as a warning</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd semester</td>
<td>Officer will be asked to find a replacement and step down</td>
</tr>
</tbody>
</table>

You are a student first!

We want your involvement to be a complement to your experience at Ohio State.
Treasurer Basics
Student Activity Fee

All students pay a $37.50 activity fee each semester

The fee is allocated to:

- Ohio Union Activities Board: 52%
- D-Tix: 6%
- Student Organizations: 13%
- Student Governments: 13%
- Buck-I-SERV: 8%
- Signature Events: 7%
- Pay It Forward: 1%
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

- Very flexible for use in daily operations
- $200 annually
- Funds issued by check in advance
- Apply between July 1st and April 1st
- Submit receipts and unused funds by May 1st
Programming Funds

Your active status determines level of programming funds

- $2,000 for new/re-established
- $3,000 for established

Requests must be submitted several months before the event takes place

Programming funds are given out through a reimbursement process

All receipts are due 30 days after the date of the event
Programming Funds

Request deadline based on event date:

- July 1: program dates 8/16 – 10/15
- September 1: program dates 10/16 – 12/31
- November 15: program dates 1/1 – 3/15
- February 1: program dates 3/16 – 5/31
- April 15: program dates 6/1 – 8/15
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

- Revenue Creation
- Tabling
- Donations
- Banquets
- Political Lobbying
- Recruitment
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%)
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
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.

• 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.
Advisor Basics
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, but may serve as co-advisors

All advisors must attend training every 2 years, first in-person, followed by online
Resources for Operations
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
Resource Room

- Only three primary officers may reserve and check out equipment.

- Any student can purchase items from the Resource Room.
Resources for Student Organizations

Marketing resources

- Graphic designers, videographers, or photographers
- Utilize Resource Room for marketing materials and printing
- Website hosting
- Sign up for involvement fairs – next one is in August (Registration will take place during summer)
- Utilize your operating funds to purchase promotional clothing for your organization
- Submit a request for BEN or Ohio Union Credenza to network with other students
- Advertise your event by placing advertisements on Ohio Union digital screens
- Add your event to the Ohio Union events calendar by emailing your event details
Resources for Student Organizations

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 and to forward the Student Organization Insider newsletter

Schedule a recurring meeting with advisor to maintain communication
Leadership Resources

• Plan a leadership retreat – utilize Student Leadership Advocates to help!

• Apply for an Ohio State University leadership retreat at no cost to you
  LEAD Retreat, (Leaders Emerging and Developing)
  LeaderShape
  Annual Conference on Leadership and Civic Engagement

• Consider participating in a service activity through the Ohio Union’s Keith B. Key Center for Student Leadership and Service
Resources for Student Organizations

Resources for events

Utilize the [Ohio Union events](#) staff to assist you in the planning and reservations process

- Meeting & Event Space
- Ohio Union Catering
- Tabling in the Great Hall
- Outdoor space
Resources for Student Organizations

Additional Resources for events

• Submit an advertisement (one paragraph) to the Student Organization Insider Newsletter by emailing CSLS@OSU.edu

• Apply for a Coca-Cola Beverage Donation package for beverages at your event

• Advertise your event by placing advertisements on Ohio Union digital screens

• Add your event to the Ohio Union events calendar by emailing your event details
Resources for Student Organizations

Other important things to know:

- Using University Trademarks
- Traffic and Transportation Management
- 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
Handout: Roadmap for Success
Discussion
What’s next?

1. Review video and enter information into management system
2. Review resources on website
3. Focus on member recruitment, development, and retention
4. Prepare a plan for officer transitions
Student Organization Staff

**Ally Himes** - Coordinator of Involvement & Student Organizations
Himes.86@osu.edu

**Jasmine Scott** – Coordinator of the Center for Student Leadership & Service
Resource Room & Office Space
Scott.1935@osu.edu

**Jen Pelletier** – Associate Director of Leadership, Student Organizations, & Service
Pelletier.17@osu.edu

**MacGregor Obergfell** – Business Development Coordinator
Student Organization Funding
Obergfell.1@osu.edu
Wrap-Up

For future reference
- Email with links and PPT slides
- Handouts

Before you leave
- Sign the Sign-in Sheet
- Turn in Evaluation