Student Organization Advisor Training 2016
Agenda

Introductions
Student Organization Philosophy
Role of the Advisor, President, Treasurer
Registration
Funding
Liability & Risk Management
Resources Overview
Questions, Wrap-up, Evaluation
From Fellow Advisors...

30 brief articles from student org advisors
Various roles, campuses

StudentAffairsCollective.org
#SAChat
Returning Advisor

Were a Former Member

Advise Multiple Orgs
“I am intentional about the organizations that I advise. If I don’t support their purpose and their mission, I have no interest in serving as their advisor. However, I will also accept a challenge if I see a gateway to help advance an organization [to] accomplish its goals or refine its mission.”

Tiffany Driver, Houston Community College
Student Organization Philosophy
Registered Student Organizations

Student Activities

Council on Student Affairs

University Senate
Philosophy on Student Organizations

A Student Organization is an association of Ohio State students created for any educational purpose that supports the vision and goals of the University set forth in the Academic Plan and the Diversity Action Plan.

Student Organizations serve as a medium for academic discourse, personal growth, leadership development, intercultural understanding, community service, and lasting friendships.
“Advising student organizations is more of an art than a science. I often think of advising organizations as a balance between giving support and providing direction. An organization needs support so students become both owners and creators of their organization, but they also need direction to learn how to navigate unknown processes or policies.”

Michael Giacalone, Rhode Island College
Minimum Criteria

• **Membership**
  • At least 5 students
  • 90% are currently-enrolled Ohio State students

• **Leadership**
  • Identify President, Secondary Leader, and Treasurer

• **Advisor**
  • Faculty or A&P staff member

• **Academic Balance**
  • Minimum GPA (2.0 for undergrad and prof, 3.0 for grad)

• **Registration Requirements**
  • Online information & Approvals
  • Trainings
Role of Advisor, President, Treasurer
Eligibility to be an Advisor

Faculty or A&P staff member
Serve with up to 3 organizations
   Unless otherwise outlined in job description

Co-advisors may be Classified Civil Service, graduate associates, community members
Role of the Advisor

Registration Requirements
- Complete training, every 2 years
- Online approvals – registration, goals

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

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

Manage Your Organization

Public Face

Set Vision, Goals

Coord. Meetings

Morale, Team Building

Communicate with Advisors, Treasurers

Build Future Leaders

Prepare for Future Success
Role of the Treasurer

- Approve Spending
- Manage All Funds
- Collect Dues
- Chief Financial Officer
- Request Funds
- Financial Wellness
- Maintain Records

Provide Financial Leadership
From Fellow Advisors...

“Sanford advanced the now time-tested concept of ‘challenge and support’ in the early 1960s. …Challenges are activities that push students beyond their current competency. Support is an environmental function that encourages growth to happen in a safe way. Too much challenge leads to frustration, and too much support impedes learning. …Under challenged and over supported means less growth.”

Dr. Christine Wilson, Univ. of Connecticut
For Discussion

What roles have you filled for your student organization?

How will you work effectively with both your president and treasurer?

What questions do you have about your role?
Tips for Success

- Mutual Expectations
- Balance Responsibilities
- Regular Communication
- Available and Approachable
- Advisor vs. Supervisor
- Enjoy Your Time!
“the truth remains that advisors put a lot of pressure on themselves to have the answers and be the expert. Many of us have the advanced degrees, life experiences, and training that our students do not, so we should be able to overcome any bump in the road, right? I’m here to say that that’s wrong. We don’t have to have the answers, and we don’t have to be afraid to ask for help.”

Casey Mulcare, Bridgewater State University
Registration Overview
### Registration Windows

<table>
<thead>
<tr>
<th>Spring Window</th>
<th>February 15 – April 30</th>
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<tbody>
<tr>
<td>Autumn Window</td>
<td>August 1 – October 15</td>
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- Organizations **self-select** their window
- Select your window based on officer transitions
- New organizations: complete registration requirements within 60 days OR by the last day of the registration window (whichever is later)
Registration Requirements

President
- Training
- Complete Online Registration

Treasurer
- Training

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

Enter organization’s **general information**:
- purpose statement
- anti-hazing statement
- organization type
- meeting and office information
- officer transition
- membership
- registration window selection

Enter and approve organization **roster**

Enter at least 2 **goals**

Upload (or verify) **constitution**
Welcome! This brief video will highlight the features of the Student Organization Management system, specifically for student organization advisors.
Registration Status

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

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

<table>
<thead>
<tr>
<th>Event</th>
<th>Description</th>
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<tbody>
<tr>
<td>Start of the registration window</td>
<td>Email reminder to complete online approvals and training <em>(when necessary)</em></td>
</tr>
<tr>
<td>After July 1</td>
<td>Operating Funds approval – automatic email once application is submitted <em>(rolling deadline)</em></td>
</tr>
<tr>
<td>Up to 5 times per year</td>
<td>Programming Funds approval – automatic email once application is submitted <em>(specific deadlines based on program date)</em></td>
</tr>
<tr>
<td>Weekly</td>
<td>Student Organization Insider email newsletter</td>
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<tr>
<td>Once per semester</td>
<td>Invitation to advisor recognition programming</td>
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Funding Overview
All Columbus-campus students pay $37.50 into the activity fee each semester.
Eligibility for Funding

1. Obtain EIN from IRS
   - Check out ohiounion.osu.edu for step by step instructions

2. Complete AP Compliance form
   - Form can be found on the Student Organizations website

3. Create organization checking account
   - Huntington, US Bank, and PNC are great options

4. Apply for funds
   - Only the treasurer can apply for CSA funds

* Sport Clubs are not eligible to apply for Student Activity Fee funds, due to support they receive directly from Recreational Sports. Sport Club treasurers do not need to attend Treasurer Training.
Operating Funds

- Use for daily operations
- Funds issued in advance
- Apply between July 1 and April 1
- Submit audit and receipts by May 1
- $200 annually
Operating Expenses

Advertising, Promotion, Printing
National Dues, Fees
Travel, 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
Programming Funds

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

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
# Application Deadlines

<table>
<thead>
<tr>
<th>Apply by…</th>
<th>Program Date</th>
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<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>
Top Five About Funding

OPERATING FUNDS:
1. $200 annually
2. Check cut in advance
3. Apply between July 1-April 1
4. Submit audit by May 1
5. Only Treasurer may apply

PROGRAMMING FUNDS:
1. $2,000 or $3,000 annually
2. Reimbursement basis
3. Some reimbursements are based on %
4. Apply by deadlines, based on program date
5. Submit audit within 30 days of program
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)
Liability and Risk Management
Relation to the University

Student organizations are not official legal entities of the university

As representatives of the university, student organization advisors assume a small amount of risk
Minimize your risk as an advisor

- Stay familiar with university policies
- Stay informed of organization activities
- Use good judgement
- “Reasonable person” standard
Indemnification Letter

Sample letter is available online.
Outlines the university’s indemnification of advisors.

Dear ________________:

I understand that you have been requested to serve as faculty/staff advisor to ____________________, a student organization recognized by The Ohio State University.

You are hereby authorized to serve as advisor to that student organization. If you elect to do so, you are authorized and directed to represent the interests of The Ohio State University as part of your official responsibilities to the university.

Under Ohio law, employees of the university are entitled to certain immunity, insurance and/or indemnity protection provided that they do not act with malicious purpose, in bad faith, in a wanton or reckless manner, or manifestly outside the scope of their official responsibilities.

Provided that you act in a manner consistent with these standards, you will be fully entitled to any such immunity, insurance, or indemnity protection in the performance of your official responsibilities as advisor.

On behalf of the university, I thank you for assuming the important role of advisor and wish you the best of luck with this endeavor.

Sincerely yours,

Title: __________________________
Risk Management

Varying levels and types of risk with student organizations

- Emergency
- Financial
- Reputation
- Safety
“Nowhere in my work does the phrase ‘meet them where they are’ apply more than in my interactions with student organizations. ...Meeting each group where they are allows me to not just make a contribution, but make the contribution that is needed.”

Jeff Pelletier, Ohio State University
University Policies

Clery Act
Federal law requires campuses to compile and publish crime statistics

FERPA
Protection of educational records

Title IX
Duty to report sexual assault, misconduct
University Resources

Hazing
studentconduct.osu.edu

Alcohol
partysmart.osu.edu

Suicide
reach.osu.edu

Sexual Violence
advocacy.osu.edu
University Resources

**BART** (Bias Assessment and Response Team)
studentlife.osu.edu/bias

**Open Doors** (diversity training)
opendoors.osu.edu

**Student Mediation Program**
studentconduct.osu.edu
More Assistance Available

Games of Chance/ Raffles/ Auctions
Controversial speakers
Campus-wide events
Legal referrals
Insurance coverage
Filing tax returns
Financial monitoring
Code of Student Conduct
For Discussion

What challenges have you experienced, or do you expect, as an advisor?
What advice would you offer to newer advisors?
How have you helped students succeed in their roles?
Resources Overview
Student Organization Staff

**Ally Himes** – Coordinator for Student Involvement
*Registration and Training*
Himes.86@osu.edu

**Jasmine Scott** – Coordinator for the KBK Center for Student Leadership & Service
*Resource Room & Center spaces*
Scott.1935@osu.edu

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

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

Student Organization Insider for
February 3rd, 2016

Student Activities Announcements
1. President, Treasurer, and Advisor Trainings Posted
2. Access88 Library Trip Opportunities
3. OSU Votes: Student Voter Registration & Education
4. Does your student organization need funding? Apply to Buckeye Soup!
5. CSA Office Hours

Student Organization Announcements
1. Mondays with Mundo Eve of the Beholder- Monday February 8th 6:30-8:30 PM at Curl Viewpoint South above Curl Market
2. BuckeyeFOSL 2/10 Winter Program Blurb
3. Valentine’s Day Flower Sale- Friday, February 12
4. APTE Summit Date: February 13th, 2016
Keith B. Key Center for Student Leadership and Service
Resource Room

Variety of supplies for student orgs and individual users
Leadership resources for check-out
$250 line-of-credit for Active student orgs
Spaces in the KBK Center
Leadership Development

Workshops/Trainings and Retreats

- Over 30 different topics
- Staff and student facilitators
- Consultation or facilitation of entire agenda
- Coca-Cola Retreat Packages
Programming Resources

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

Working with food
Showing a movie
Transportation
International Travel
Marketing Resources

Graphic Designers
Photography/Videography
Vendors for promotional items
Student Activities online calendar
Ohio Union digital screens
University Brand compliance

ohiounion.osu.edu/about_the_union/marketing
brand.osu.edu
Technology Resources

Website hosting by university
Organizational email listservs
Organizational email accounts

ohiounion.osu.edu/get_involved/
student_organizations/resources
“Advising student organizations...is like cultivating asparagus...In fact, while gardeners probably wished asparagus would mature faster, I’m jealous they have LONGER (3 years) than I do with most of my students. ...Anyone who advises student organizations knows it takes A LOT of training and time to develop the experiential skills that students need to lead their peers. We need to cultivate them into leaders, just like gardeners do with their crops.”

Kimberly Irland, Jamestown Community College
Questions, Wrap-up and Evaluation
Thank You for Attending

Before You Leave:
  Sign attendance sheet

Following Today’s Training:
  Confirmation email, links/ resources
  Complete session evaluation online

Contact Us:
  csls@osu.edu or 614-292-8763