STUDENT ORGANIZATION
OFFICER TRAINING
for Presidents

THE Ohio STATE
University
OFFICE OF STUDENT LIFE
STUDENT ACTIVITIES
Find two people around you:
Introduce yourself
And describe what your organization does
What do you feel is your role as the president?
Loner
Over-achiever
Disengaged
Ball dropper
Distracter
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>Complete President’s training</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>
<tr>
<td>Communicate with treasurer to complete training</td>
</tr>
<tr>
<td>Communicate with advisor to complete training and approve registration and goals</td>
</tr>
</tbody>
</table>

Only the president has access to make these changes!
Role of the Treasurer

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

Requirements

<table>
<thead>
<tr>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend advisor training every 2 years</td>
</tr>
<tr>
<td>Approve registration, goals, and funding requests</td>
</tr>
<tr>
<td>Co-sign on a bank account for organization</td>
</tr>
</tbody>
</table>

Leadership of Organization

<table>
<thead>
<tr>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary resource for the organization</td>
</tr>
<tr>
<td>Provide continuity, perspective, suggestions, and advice</td>
</tr>
</tbody>
</table>
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.
Annual Registration Requirements

President
- Training
- Complete online registration

Treasurer
- Training

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

Two Registration Windows

<table>
<thead>
<tr>
<th>Spring Window</th>
<th>February 15 – April 30</th>
</tr>
</thead>
<tbody>
<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

*Some information in this video will be discussed afterward

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>
Ohio Union Website and Student Organization Management Site
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

Constitution Requirements

- Purpose Statement
- Member selection and removal processes
- Officer selection and removal processes
- Non-discrimination policy
- 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

Inactive → Pending → Active – New/Re-Established → Active – Established

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><strong>Inactive</strong></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><strong>Pending</strong></td>
<td>Brand new organizations or organizations in the process of completing registration requirements.</td>
</tr>
<tr>
<td><strong>Active – New/Re-established I or II</strong></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><strong>Active - Established</strong></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>
Status Progression: Representation of end of window

If all requirements are met:

- **Inactive** (or no previous status)
  - Active New/Re-established I

- **Active New/Re-established I**
  - Active New/Re-established II

- **Active New/Re-established II**
  - Active/Established
  - If requirements aren’t met

- **Active/Established**
  - Active/Established
  - If requirements aren’t met
  - Active New/Re-established I

If requirements aren’t met:

- Active New/Re-established I
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%

brought to you by student activity fee
Funding Basics

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

<table>
<thead>
<tr>
<th>Event Date</th>
<th>Request Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 16 - October 15</td>
<td>July 1</td>
</tr>
<tr>
<td>October 16 – December 31</td>
<td>September 1</td>
</tr>
<tr>
<td>January 1 – March 15</td>
<td>November 15</td>
</tr>
<tr>
<td>March 16 – May 31</td>
<td>February 1</td>
</tr>
<tr>
<td>June 1 – August 15</td>
<td>April 15</td>
</tr>
</tbody>
</table>
Fundable Programs

1. Educational or Service Activity

2. Open to all students across campus

3. Broadly marketed

4. 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.
Fundraising and Sponsorship

- A great way to supplement your budget!
- Fundraiser restrictions: Barnes & Noble only
- Sponsorship restrictions:
  - Coca-Cola competitors
  - Huntington Bank (right of first refusal amongst any banks)
Additional Funding Resources

• Ohio Union Activities Board Collaborative Events
  • ouab.osu.edu

• Student Government Funding
  • usg.osu.edu
  • cgs.osu.edu
  • ipc.osu.edu

• Multicultural Center
  • mcc.osu.edu

• College and Departmental Funds
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
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.
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
- Utilize your operating funds to purchase promotional clothing or other supplies to facilitate organization operation
Technology Resources

- 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 for Student Organizations

Marketing resources

• 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
• 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
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
Resources for Student Organizations

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

*Cancellation fees may apply! You could be charged if you do not give proper notice before cancelling
Resources for Student Organizations

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
BuckeyeLand!

• Get in groups of 5 – come up to the front to get a board, buckeye, and cards

• Introduce yourself. Read game directions. Be sure cards are in order.

• Go through the cards in order and discuss the items with your team.
BuckeyeLand!

- When you’re finished, return materials and cards in order!
- We have a few more slides to get through.
- If you have questions for me, come ask!
- Double check – did you sign the sign in sheet?
Roadmap for Success
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 presentation slides
- Roadmap for Success

Before you leave
- Sign the Sign-in Sheet
- Complete evaluation