

Student Organization Leadership Training

Presentation – 2025

Contact us
cce@csuohio.edu



Welcome and Overview

Your Role in Shaping Campus Life

As student leaders, you are essential partners in creating vibrant campus experiences. This training provides the framework and tools you need to lead successful organizations while navigating university systems effectively

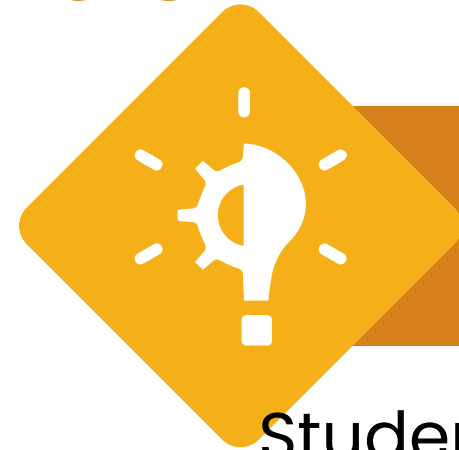
Today's Agenda:

- Understanding the organizational ecosystem
- Mastering financial management
- Building sustainable programs
- Leveraging Campus Resources

Organizational structure



How Student Life Works at CSU



The Partnership Model

Students Organizations Campus Engagement Student Belonging & Success

Key Partners:

- Campus Engagement (CE) – Your primary support team and decision- making authority
- Conference services- Event planning and Space Management
- Student Government(SGA)- Advisory body for funding recommendations
- GFAC- Reviews funding requests and provides recommendations to CE

Your Organizations Place :

- Recognized Student Organizations (RSO) have full privileges
- Annual registration maintains your active status
- Compliance with policies ensures continued support

Important Note : SGA and GFAC serve in advisory capacities only. Final decisions on funding and operations rest with Campus Engagement.

The Accountability Framework



Standard for Success – Core Requirements

1. Leadership Structure

- 4 Officers minimum (President, VP, Secretary, Treasurer)
- Active faculty/staff advisor
- All officers complete position training

2. Annual Commitments

- Spring Registration renewal
- April 30th Summary report
- One public event per semester
- One campus tabling event per semester

Why it matters :

- Ensures equitable resource distribution
- Protects your organization's funding
- Maintains institutional support

3. Meeting standards

- Monthly Advisor Meetings
- Accurate roster in VikesConnect
- Updated budget submissions



Financial Management



Account Type

Agency Account
Allocation Budget
One-time Funding



Source

Your Fundraised money
SGA/GFAC recommending
funding
Special projects



Who Controls

Your organization
Shared oversight
Request Basis



Final Approval

Campus Engagement
Campus Engagement
Campus Engagement

The Budget Process

1. **Request** - Submit detailed budget with documentation
2. **Review** - GFAC evaluates and provides recommendations
3. **Decision** - Campus Engagement makes final determination
4. **Access** - Funds available in VikesConnect after CE approval
5. **Report** - Annual summary of use required

Critical Rules

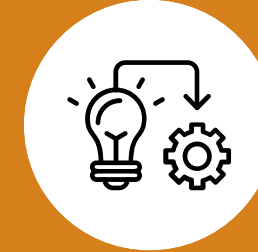
1. No purchases before Campus Engagement approval
2. Advisor approves requests; CE authorizes expenditures
3. Ohio sales tax exempt (save those receipts!)
4. All money flows through university accounts
5. Personal purchases = personal liability

Event Plannning Excellence



Days Before Event

45+ days
30 days
21 days
14 days
Day of
After



Required Action

Submit travel requests
Submit Event Requests in VikesConnect
Finalize all vendor contracts
Confirm all logistics
Execute your plan
Submit receipts and documentation

Required Approvals

- Advisor review on all events
- CE approval for compliance and funding
- Conference services for space
- Additional reviews for alcohol/high risk events

Pro Tips

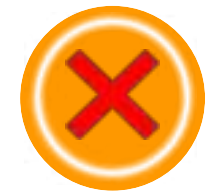
- Book popular spaces early
- Account for setup/breakdown time
- Budget for security and facilities costs
- Keep attendance records

Common Pitfalls & Solutions

Avoiding the Danger Zones

Financial Red Flags:

Don't Do This



- Use Venmo/ CashApp for org money
- Sign contracts yourself
- Buy first, ask later

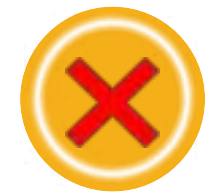
Do This Instead



- Use ShopNet for credit card processing
- Submit to CE for university signature
- Get CE approval before ANY purchase

Compliance Issues:

Problems:



- Missing deadlines
- Incomplete documentation
- Going rogue on events

Solutions:



- Set calendar reminders for all requirements
- Keep digital copies of everything
- Partner with CE from the start



Resources & Support



Campus Engagement Office

- **Location:** Student Center 343
- **Email:** cce@csuohio.edu
- **Hours:** Mon-Fri 8am - 5pm
- **Note:** *Your designated CE contact has final approval on all financial matters*



Key Contacts

- **Financial Questions:** Your CE Advisor
- **Event Planning:** Conference Services
- **Funding Recommendations:** SGA Finance Committee (advisory only)
- **Policy Questions:** Campus Engagement



Digital Tools

- **VikesConnect:** Your hub for everything
- **ShopNet:** Payment processing
- **Digital Displays:** Free advertising
- **Viking Newsletter:** Event promotion

Spring 2026 Implementation



What's New This Academic Semester?



Enhanced Support

- Streamlined budget process with CE final approval
- Clearer funding guidelines
- Improved training guidelines
- Faster approval timelines



Your Action Items

- Complete Officer Training (REQUIRED)
- Submit spring budget request to GFAC for review
- Await CE final approval on budgets
- Update roster in VikesConnect
- Schedule advisor meeting
- Plan your semester events



IMPORTANT DATES

- Budget Submissions: February 28
- Annual Reports: April 30
- Re-registration: April – May
- GFAC Reviews: Monthly (recommendations to CE)

Excellence Standards



What Success Looks Like

- Active, engaged membership
- Well-attended events
- Clean financial records
- Positive campus impact
- Sustainable operations



Must – Do Checklist

- **Always maintain 4 officers**
- Keep advisor actively engaged
- Submit budgets on time with documentation
- Await Campus Engagement final approval before spending
- Host required events each semester
- Complete annual report by April 30
- Attend mandatory trainings
- Update VikesConnect regularly
- Follow purchase procedures



How We Measure Impact

- Event attendance
- Member retention
- Budget utilization
- Community feedback
- Goal achievement



NEVER

- Sign contracts
- Use personal accounts for org money
- Skip CE approval processes
- Miss registration renewal
- Ignore advisor requirements
- Spend before receiving CE authorization

Questions & Next Steps



Remember:

- We're here to help you succeed
- Compliance protects your organization
- Following procedures ensures funding
- Your impact matters

Before you leave:

1. Confirm your officer training completion
2. Review your organization's current compliance status
3. Schedule any needed follow-up meetings with your CE contact
4. Access resources in VikesConnect

Contact Us



216-687-2048



www.csuohio.edu/campus-engagement



cce@csuohio.edu



Campus Engagement Student Center 343

Emergency Contact:
Campus Safety: 216-687-2020

Treasurer Training Overview

Welcome, new student organization treasurers!

This training will equip you with the knowledge and tools to effectively manage your organization's finances and ensure compliance with university policies. You play a crucial role in the success and sustainability of your student group.

Key Responsibilities: Stewarding Your Org's Funds



Pre-Approval is Key

Ensure Campus Engagement approves all purchases BEFORE you make them.



Accurate Record Keeping

Maintain meticulous financial records using VikesConnect. Every transaction counts.



Budget Submission & Documentation

Submit comprehensive budgets with all required documentation to secure funding.



Monitor Spending & Guidelines

Proactively track expenses against GFAC guidelines to avoid discrepancies.



Communication & Reporting

Keep your leadership, advisor, and Campus Engagement informed on budget status.



Receipt Retention

Retain ALL receipts and documentation for every purchase for audit purposes.

Budget Approval & GFAC Evaluation



Understanding the flow of funds, from initial proposal to final report, is critical for seamless operations.



GFAC Evaluation Criteria:

- Compliance: Adherence to all university and GFAC policies.
- Campus Impact: How the activity benefits the wider university community.
- Event Reach: The number of students who will be positively affected.
- Mission Alignment: How the spending supports your organization's core mission.

Navigating Funding Guidelines



Permitted Expenses

Branded Personal Property: Up to 10% of budget or \$600 (e.g., t-shirts).

Speakers: Contracted up to \$1,500; Non-contracted up to \$250.

Meals: \$10 breakfast, \$15 lunch, \$20 dinner per person.

Travel(Conferences): Max \$1,500 per organization.

Hotels: Up to \$150/night.

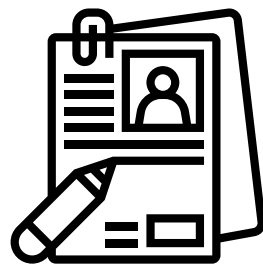
Mileage: \$0.67 per mile (current IRS rate).

Prohibited Activities

To ensure responsible stewardship of student funds, certain expenditures are strictly prohibited:

- Alcohol purchases
- Off-campus retreats
- Year-end parties (unless structured as an educational event)
- Donations to other organizations or charities
- Personal use items not branded or exceeding limits

Ensuring Compliance: A Treasurer's Checklist



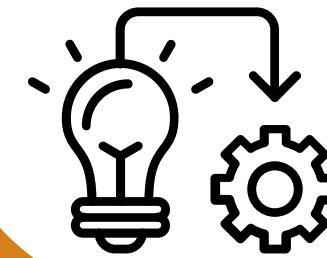
Key Compliance Actions

Timely Submissions: Submit all budgets and reports by their deadlines.

Advisor Meetings: Meet monthly with your advisor to review financial status.

Record Keeping: Maintain a complete, organized record of all financial documents.

Policy Adherence: Understand and follow all university and Campus Engagement policies.



Strictly Prohibited Actions

Personal Accounts: NEVER use personal funds or accounts for organizational purchases.

Signing Contracts: Student treasurers are NOT authorized to sign contracts on behalf of the university or organization.

Unauthorized Spending: Do not spend any funds without explicit pre-approval from Campus Engagement.

Missing Deadlines: Crucial deadlines for budget submissions or reports can lead to loss of funding.

Thank you for listening!

You are not alone in this role! Utilize the resources available to ensure your success.

- **Office Hours:** Monday–Friday, 8:00 AM – 5:00 PM

Emergency Contact:

Campus Safety: 216-687-2020

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Engagement