Welcome to the Leadership and Campus Life Presidents and Advisors Workshop

student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

Agenda

University Accounting
Funding
Marketing
Meeting and Conference Service
Leadership and Campus Life
Service Volunteer Center

University Accounting

304 Whitehurst

405-744-5881

Lynette Venard

student UNION

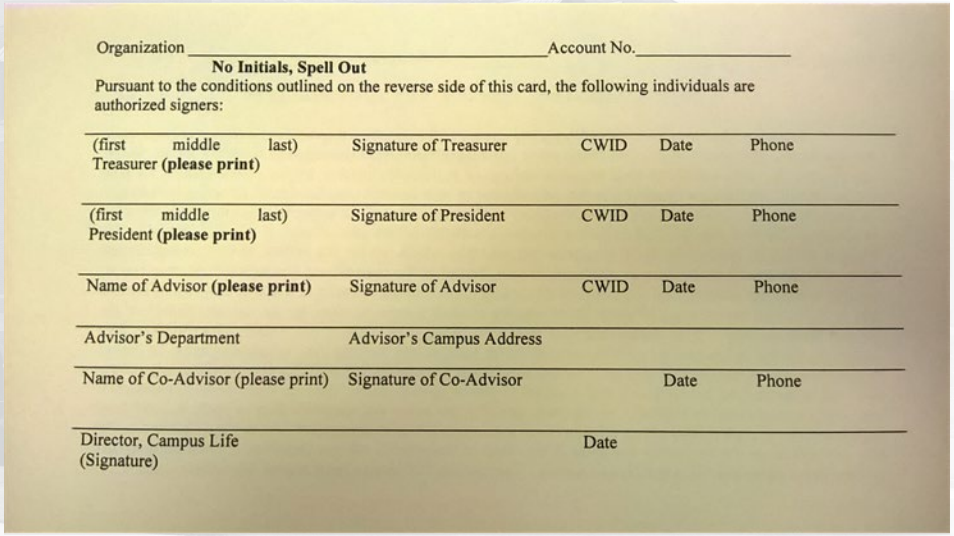
LIFE HAPPENS AT THE UNION

http://union.okstate.edu

/osuunion

Signature Card

- Often called a "Yellow Card"
- Campus Life 211 Student Union
- Update Campus Link
- University Accounting will compare signatures from signature card to disbursement voucher in order to process disbursement vouchers

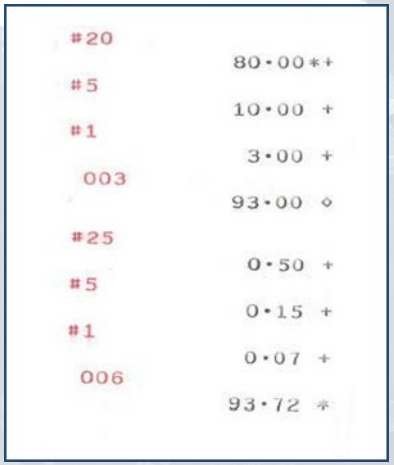


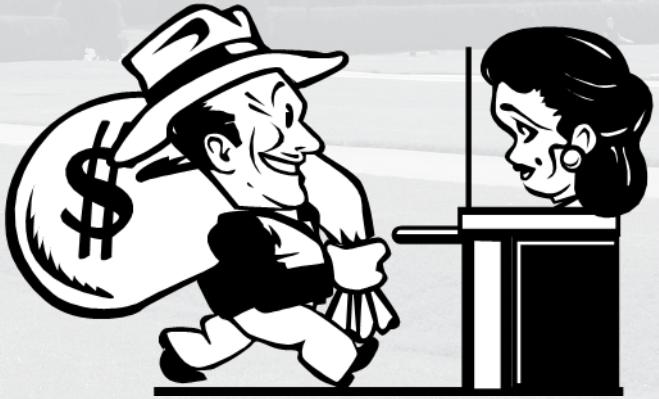
Organization _____ Account No._____
No Initials, Spell Out
Pursuant to the conditions outlined on the reverse side of this card, the following individuals are authorized signers:

(first middle last) Treasurer **(please print)**	Signature of Treasurer	CWID	Date	Phone
(first middle last) President **(please print)**	Signature of President	CWID	Date	Phone
Name of Advisor **(please print)**	Signature of Advisor	CWID	Date	Phone
Advisor's Department	Advisor's Campus Address			
Name of Co-Advisor (please print)	Signature of Co-Advisor		Date	Phone
Director, Campus Life (Signature)		Date		

Deposits

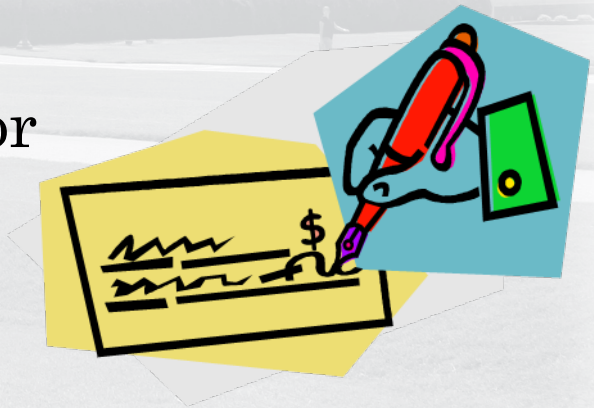
- Must be made within 24 hours of receipt of funds
- Take deposit transmittal form with funds to Bursar's office in 113 Student Union
- Need name of student organization, fund code, phone number of treasurer and phone number of advisor on back of checks
- Must include adding machine tape – An adding machine is available to students in Leadership and Campus Life 211 SU





Disbursement Vouchers

- Disbursement vouchers available in 304 Whitehurst
- To reimburse a student – CWID along with name and address
- To pay a company – must have FEI number (tax ID number) along with name and address
- Voucher must be signed by President or Treasurer and Advisor

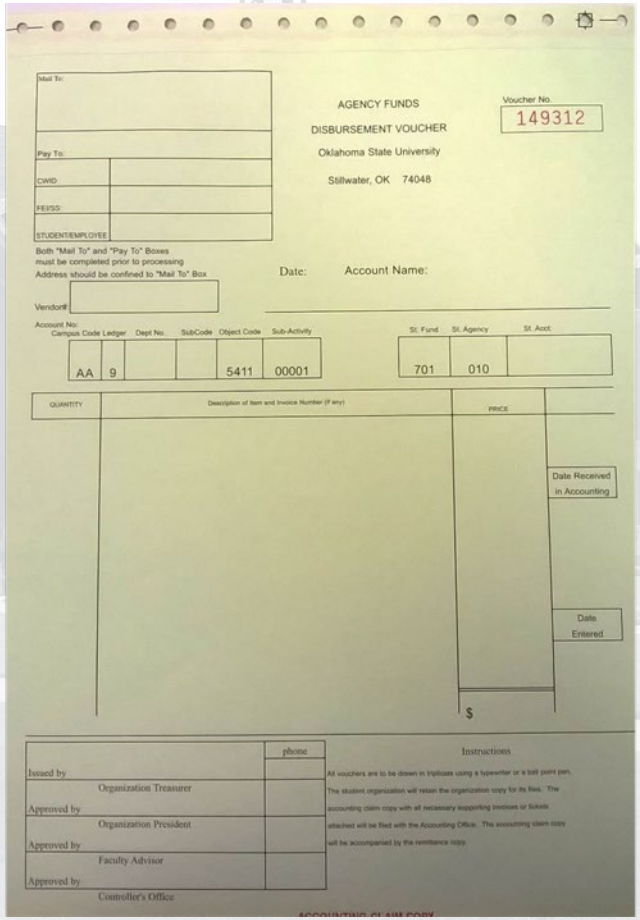


Disbursement Vouchers

- Include itemized receipt or invoice to be paid or reimbursed
- Itemized original receipt **must** include date of transaction, amount, vendor name and **itemized description of item(s)** purchased & **show proof of payment**
- Invoice to be paid is to be placed between yellow and green copies of voucher below perforation
- If mailing a form to vendor, must include extra copy and attach it to green copy of voucher

Disbursement Vouchers

- Check should be issued within 2 weeks after being approved for payment by University Accounting
- Treasurer will need to keep gold copies of the disbursement vouchers to reconcile with FGRODTA's
- Student organizations are not exempt from paying sales tax



Campus Vendor Invoices

- If purchase items from bookstore or rent vehicles from Motor Pool, OSU campus department will charge student organization (DO NOT use disbursement voucher)
- Examples: Motor Pool, Student Union bookstore, Daily O'Collegian and Physical Plant work orders

Purchasing Gift Cards

- Maximum amount $25 per card – limit of $250 for all cards
- Keep log with name, address, CWID, and amount of gift card for each recipient
- Each recipient must sign log. That log **must** be attached to disbursement voucher.

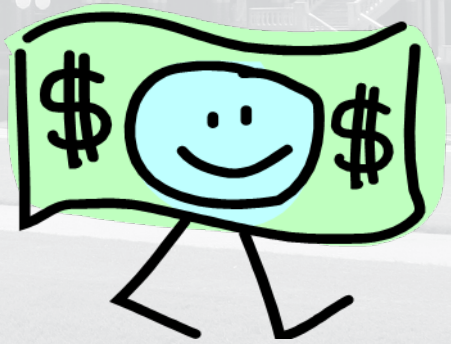
Gift Card Log Example

GIFT CARD LOG				
Name of Recipient	Address	CWID	Amount of Gift Card	Signature
ex. Lea Johnson	123 Smith Street, Stillwater, OK 74074	A123148450	$ 25.00	Lea Johnson

student UNION
LIFE HAPPENS AT THE UNION

Transfers

- Student organizations may transfer funds to another student organization
- Memo needs to include current date, name and fund number (1-991XXX)of student organization receiving funds and name and fund number (1-991XXX) of student organization paying funds
- Memo must be signed by President or Treasurer and Advisor of organization paying the funds



Donations

- Student organization receiving AFAP funds can't use those funds to make a charitable donation
- Use a disbursement voucher to make a donation
- Required documentation includes copy of deposit showing funds were deposited into the student organization fund and a memo with description, name and address of charity. Memo **must** be signed by the advisor

Accounting Reports

- Available around 1st working day of month from advisor
- FGRGLTA/FGRFAAC – provides monthly fund balance
- FGRBDSC – provides current month and year to date amounts for revenue and expenses
- FGRODTA – lists all transactions for revenue and expenses for the current month

FGRGLTA / FGRFAAC

FGRFAAC 8.7 — OSU and A&M (PROD) — 02-AUG-2017 12:59:54 AM
FISCAL YEAR 18 — Fund/Account Activity Report — PAGE 6662
AS OF 31-JUL-2017

CHART: 1 Oklahoma State - General University
FUND : 991500 Ag Ambassadors

ACCOUNT	ACCOUNT TITLE	BEGINNING BALANCE	DEBITS	CREDITS	ENDING BALANCE
119999	Claim On Cash	10,336.79	10,686.79	975.38	9,711.41
160000	Interchart Due/To From	.00	150.00	150.00	.00
169999	Interchart Claim on Cash	.00	.00	150.00	-150.00
TOTAL:	Cash & Cash Equivalents	10,336.79	10,836.79	1,275.38	9,561.41
TOTAL:	Assets	10,336.79	10,836.79	1,275.38	9,561.41
210000	Accounts Payable	.00	975.38	975.38	.00
TOTAL:	Accounts Payable	.00	975.38	975.38	.00
TOTAL:	Liabilities	.00	975.38	975.38	.00
301100	Revenue Control	.00	.00	350.00	-350.00
302100	Expenditure Control	.00	1,125.38	.00	1,125.38
TOTAL:	Control Accounts	.00	1,125.38	350.00	775.38
TOTAL:	Control Accounts	.00	1,125.38	350.00	775.38
409090	Fund Balance - Agency Funds	-10,336.79	10,399.86	20,736.65	-10,336.79
TOTAL:	Agency Funds	-10,336.79	10,399.86	20,736.65	-10,336.79
TOTAL:	Fund Balance	-10,336.79	10,399.86	20,736.65	-10,336.79
	TOTAL LIABILITIES & FUND BALANCE:	-10,336.79	12,500.62	22,062.03	-9,561.41

FGRBDSC

REPORT FGRBDSC
FISCAL YEAR: 18

OSU and A&M (PROD)
Budget Status (Current Period)
AS OF 31-JUL-2017

RUN DATE: 08/01/2017
TIME: 11:31 PM
PAGE: 6938

COAS: 1 Oklahoma State - General University
FUND: 991263 Stu Govt Assn
PRED ORG: E00444 Campus Life Administration
ORG: 100444 Campus Life Administration

ACCOUNT	ACCOUNT TITLE	ADJUSTED BUDGET	CURRENT PERIOD ACTIVITY	YEAR TO DATE ACTIVITY	BUDGET RESERVATIONS	AVAILABLE BALANCE	CMT TYP
500960	Oth Non-Rev Receipt	.00	99.47	99.47	.00	-99.47	U
TOTAL	Other Operating Revenues	.00	99.47	99.47	.00	-99.47	
703030	Off Supp-Expendable	.00	75.05	75.05	.00	-75.05	U
TOTAL	Supplies & Materials	.00	75.05	75.05	.00	-75.05	
706300	Cvi Month Phone Chg	.00	129.25	129.25	.00	-129.25	U
706350	Cvi Long Distance C	.00	3.00	3.00	.00	-3.00	U
TOTAL	Communications	.00	132.25	132.25	.00	-132.25	
707200	Repr & M-Building	.00	91.15	91.15	.00	-91.15	U
TOTAL	Contractual Services	.00	91.15	91.15	.00	-91.15	
708950	Othr C Exp-A/Trust	.00	834.32	834.32	.00	-834.32	U
TOTAL	Other Operating Expenses	.00	834.32	834.32	.00	-834.32	
TOTAL ORGANIZATION							
100444	Campus Life Administration						
TOTAL	Revenue	.00	99.47	99.47	.00	-99.47	
TOTAL	Expenditures	.00	1,132.77	1,132.77	.00	-1,132.77	
NET		.00	-1,033.30	-1,033.30	.00	1,033.30	

FGRODTA

01-AUG-2017 11:20:46 PM
FISCAL YEAR 18

OSU and A&M (PROD)
Organization Detail Activity
From 01-JUL-2017 To 31-JUL-2017

PAGE 11549
FGRODTA

COAS: 1 Oklahoma State - General University
ORG: 100444 Campus Life Administration

TRANS DATE	TRAN TYPE	DOCUMENT NUMBER	DOCUMENT REF #	DESCRIPTION	ACCOUNT/ FUND	BUDGET ACTIVITY	TRANSACTION ACTIVITY	ENCUMBRANCE ACTIVITY	CMT TYP
				Stu Govt Assn	991263				
BEGINNING BALANCE:				Oth Non-Rev Receipt	500960	0.00	0.00	0.00	
07/06/2017 CH1		F0015077	108976	student gov association	500960		24.47		U
07/19/2017 C1H		J0073063		Inter Agency Transfer	500960		75.00		U
ENDING BALANCE:				Oth Non-Rev Receipt	500960	0.00	99.47	0.00	
BEGINNING BALANCE:				Off Supp-Expendable	703030	0.00	0.00	0.00	
07/20/2017 J25		BK000398	00044578	STUDENT UNION	703030		12.15		U
07/26/2017 J25		BV000043		0792129SPECTRUM PAINT #7	703030		62.90		U
ENDING BALANCE:				Off Supp-Expendable	703030	0.00	75.05	0.00	
BEGINNING BALANCE:				Cvi Month Phone Chg	706300	0.00	0.00	0.00	
07/20/2017 J25		TL000026	TELECO07	Telecomunnication Services	706300		99.00		U
07/20/2017 J25		TL000026	TELECO07	Telecomunnication Services	706300		10.25		U
07/20/2017 J25		TL000026	TELECO07	Telecomunnication Services	706300		20.00		U
ENDING BALANCE:				Cvi Month Phone Chg	706300	0.00	129.25	0.00	
BEGINNING BALANCE:				Cvi Long Distance C	706350	0.00	0.00	0.00	
07/20/2017 J25		TL000026	TELECO07	Telecomunnication Services	706350		3.00		U
ENDING BALANCE:				Cvi Long Distance C	706350	0.00	3.00	0.00	
BEGINNING BALANCE:				Repr & M-Building	707200	0.00	0.00	0.00	
07/26/2017 J25		FM000103	00252439	FACILITIES MGMT	707200		17.86		U
07/26/2017 J25		FM000103	00253499	FACILITIES MGMT	707200		8.93		U
07/26/2017 J25		FM000103	00253499	FACILITIES MGMT	707200		1.65		U
07/26/2017 J25		FM000103	00254184	FACILITIES MGMT	707200		24.75		U
07/26/2017 J25		FM000103	00254184	FACILITIES MGMT	707200		37.96		U
ENDING BALANCE:				Repr & M-Building	707200	0.00	91.15	0.00	

Accounting Reports

- Revenue account codes
  - 500140 AFAP money
  - 500960 deposits made at Bursar office
  - 811970 transfers
- Expense account codes
  - 708950 disbursement vouchers
  - 705480 Motor Pool rental of vehicle
  - 708510 Daily O'Collegian ads

PCARD

- Contact: Billie Watt
  - 405-744-8408

student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

Any questions??

student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

Funding

Organization Funding

- Graduate Student Organizations: GPSGA is the funding source for Graduate groups

- Sports Organizations: Sports Club Council is the funding source for Sports Clubs and they are not eligible for SGA funding

AFAP Funding

- **Activity Fee Allocation Process**
- Purpose: A certain portion of student activity fees are set aside each year to be disbursed to student organizations to carry out programming
- Amount: Varies greatly dependent upon need.
- Eligibility: Only Group 1 Recognized student organizations are eligible. These groups must also be "current" with CampusLink and University Accounting as well as have completed the Treasurer's training module during the current school year. Groups that have not processed repayment of unused SGA funds from previous semesters will not be eligible.
- Process: Applications become available by December. They must be completed on-line. After the deadline has passed (in late January), a series of hearings will be held to consider funding request. Once allocations have been approved by the university president, funds will be disbursed in two equal payments – one each in the fall and spring semester of the following academic year.
- **Deadline: Last Friday in January**

SGA Co-Sponsorship

Co-Sponsorship:

•Purpose: A certain portion of student activity fees are set aside each year to be disbursed to student organizations for use in carrying out one-time events. This can include, but it is not limited to a program that is being hosted or sponsored by the student organization or attendance at a conference.

•Amount:

Group 1 Registered student organizations are eligible to receive up to $500 a year (until fund is depleted)

Group 1 Recognized student organizations are eligible to receive up to $1000 a semester (until fund is depleted)

•These groups must also be "current" with Leadership & Campus Life and not have any outstanding repayment due to SGA.

•Process: Submit an application via the website:

http://osusga.okstate.edu/images/Documents/co-sponsorship.2.14.13.fillable.pdf

A representative must attend the SGA Budget Committee Meeting and SGA Senate Meeting when the co-sponsorship is being considered. Once the legislation has passed, funds will be transferred directly into the organizations account.

•Deadline: Applications must be submitted prior to the event or conference the organizations is requesting funding for. Applications submitted by 4pm on Wednesday may be discussed at the next weeks SGA Budget Committee Meeting.

SGA Multicultural Affairs Funding

Multicultural Affairs Committee (MAC):

•Purpose: To assist any student organization that wishes to promote multicultural interaction and activities on the OSU campus

•Amount: Varies depending on need.

•Eligibility: Must be a registered student organization.

•Process: Submit an application which includes a description of the event or conference with a detailed budget on the website:

https://app.it.okstate.edu/sga_forms/index.php/module/Default/action/ViewForm/form_key/50

Attend the SGA committee meeting for the request to be heard. Funds will be transferred directly into the organization's account once the committee has made a decision to fund the group.

• Deadline: No deadline, groups can apply throughout the fall and spring semester

Meeting and Conference Services

179 Student Union

405-744-5232

207 Wes Watkins Center

405-744-9359

student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

Forms, Guidelines, and Policies

http://meetings.okstate.edu/guidelines

Forms:

- Student Union Indoor Request Form
- Outdoor Event Request Form
- Tabling Request Form
- Campus Signage Request Form
- Food-on-Campus Waiver Application
- Alcohol Beverage Service Request Form

Guidelines & Policies:

- Guidelines for the Use and Scheduling of Public Spaces of the OSU Center for Student Services
- Policy Governing use of the OSU Student Union Public Space
- Building and Public Service Area Hours
- Student Union Solicitation Policy and Procedure
- Student Union Guidelines on Dances, Social, and Public Events
- Guidelines for the Service of Alcoholic Beverages in the SU
- Guidelines for the Use of Bennett Chapel

Forms, Guidelines, and Policies

http://meetings.okstate.edu/guidelines

Reserving Space

Meeting Conference Services Reserves Space for the:

- Student Union
- Wes Watkins Center
- Bennett Chapel
- Table Space
- Outdoor Space

Space is free inside the Student Union for student organizations unless the group is recouping any fees or if the space requires a tech. On-campus rates apply for the Wes Watkins Center and Bennett Memorial Chapel.

Reserving Space

Student groups can begin to reserve meeting space on:

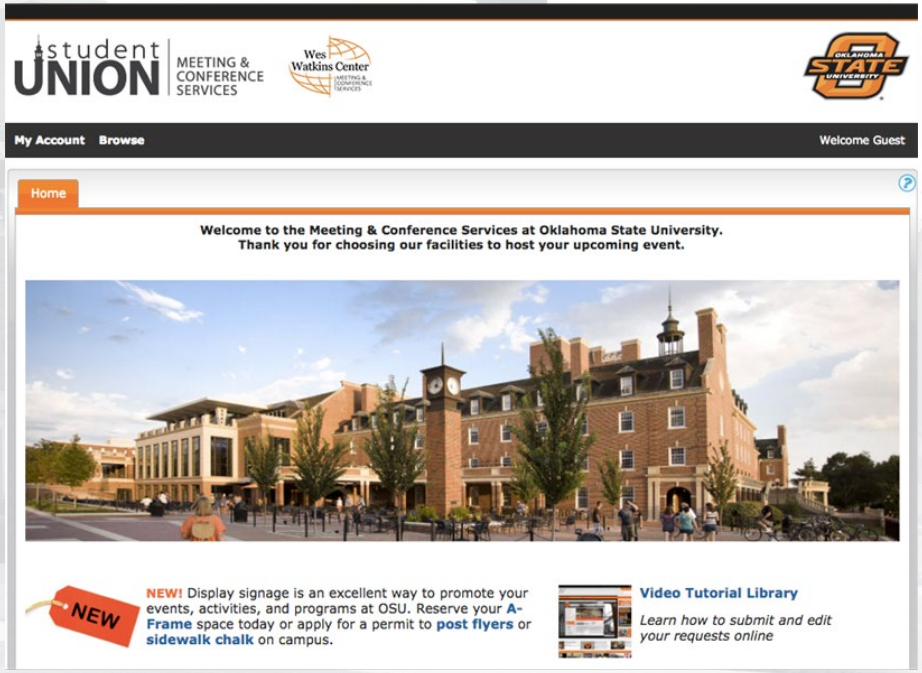
October 1st for Spring Semester

February 1st for Fall Semester

When logging in to reserve a space, use your short user name and regular password.

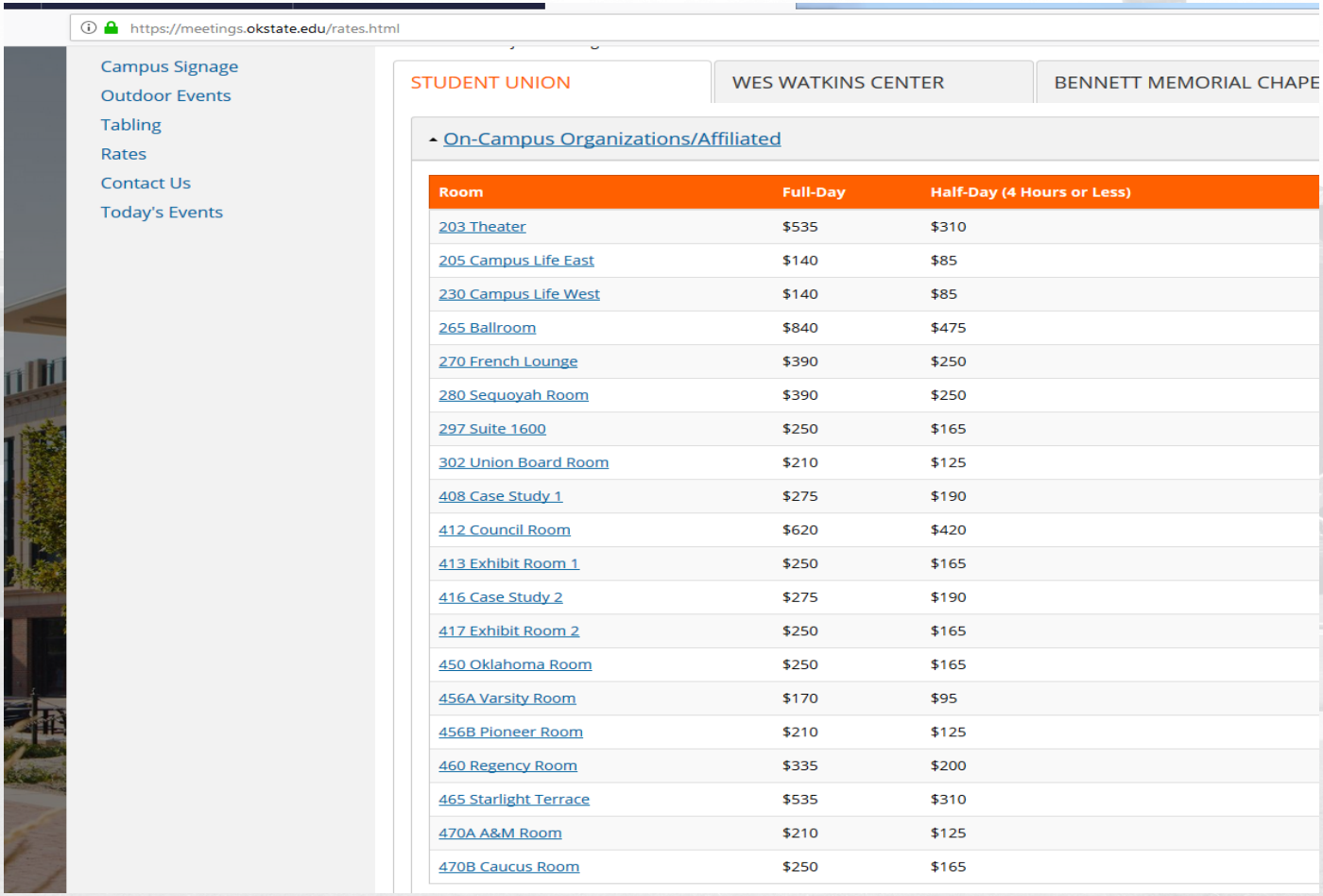
Do not use: pistol.pete@okstate.edu

Use: ppete



Student Union, Wes Watkins, and Bennett Chapel Rates

http://meetings.okstate.edu/rates



Room	Full-Day	Half-Day (4 Hours or Less)
203 Theater	$535	$310
205 Campus Life East	$140	$85
230 Campus Life West	$140	$85
265 Ballroom	$840	$475
270 French Lounge	$390	$250
280 Sequoyah Room	$390	$250
297 Suite 1600	$250	$165
302 Union Board Room	$210	$125
408 Case Study 1	$275	$190
412 Council Room	$620	$420
413 Exhibit Room 1	$250	$165
416 Case Study 2	$275	$190
417 Exhibit Room 2	$250	$165
450 Oklahoma Room	$250	$165
456A Varsity Room	$170	$95
456B Pioneer Room	$210	$125
460 Regency Room	$335	$200
465 Starlight Terrace	$535	$310
470A A&M Room	$210	$125
470B Caucus Room	$250	$165

Football Gameday Tailgate Reservations

http://meetings.okstate.edu/GamedayTailgate

New rules will be implemented this year. Please contact MCS for more details

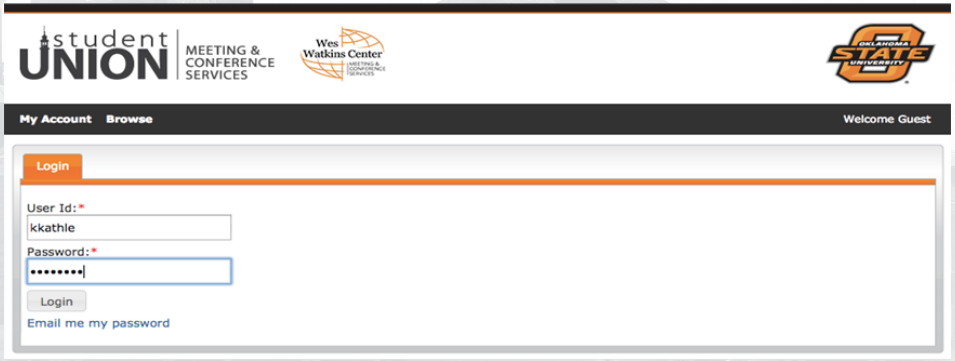
Flyer and Chalking Permits

If you have the poster ready for approval 10 business days before it needs to be distributed you can complete the online approval process.

If it is under 10 business days you will need to visit the office and complete the Campus Signage Request Form.

Virtual EMS

You Will Need to
Log in Using Your:



Short OKey User ID

OKey Password

Marketing 101

Kailey Bookout
Student Union Marketing Coordinator
311D Student Union
(405)744-5046 | kailey.rose@okstate.edu

student UNION
LIFE HAPPENS AT THE UNION

Session Outline

1. What is Branding?
2. Public Relations Opportunities
3. Student Union Communications Coordinator Position

What is branding?

Your brand is your image. And your image is what helps you build and maintain your membership. Your brand is the persona your organization projects to perspective and current members as well as other influencers such as family members, alumni, faculty, etc.

Your reputation is what is going to make you sink or swim. Make your organization stand out in the best way possible and map out your way to success.

1.Lack of Planning
2.Inconsistent Brand Image
3.Producing Low Quality Content
4.Breaking Brand Promises
5.Underestimating Online Marketing Opportunities
6.Not Listening to Your Audience
7.Badly Designed and Hard to Navigate Website
8.Crossing Line Between Different and Offensive

Public Relations Opportunities

- Campus A-frames
  - $75 per location for 10 working days
  - Set up through Facilities Management at http://fm.okstate.edu/signs. Keep in mind required timeline to set up the appointment and plan accordingly.
  - Artwork can be created on Student Union Marketing Department and has a required 4 week timeframe.
- OSU Calendar
  - http://calendar.okstate.edu
  - Anyone with an O-key login can add events.
- CampusLink
  - http://lcl.okstate.edu/campuslink-user-guide
- Chalking
  - For chalking permits or to set up reservations visit: http://meetings.okstate.edu/
- Campus Postings
  - Flyers must be approved and stamped at the Meeting & Conference Services desk (Student Union room 179) before they are posted on campus.
- Digital Signage in the Student Union
- Video Services
  - You can contact our Multimedia Producer, Coleton Gambill: bain.gambill@okstate.edu, for any questions you may have about creating video footage for your organization.
- Photoboxx
  - Reserve through Student Union Activities Board.
  - Once you have a reservation, you can request the Student Union Marketing Department to design a unique frame just for you!

Student Union Marketing Department

- Design and print services available, including social media and digital graphics
  - For printing purposes, our department is working with FedEx to keep costs down and one easy way to do that is giving ample time for FedEx to complete the print job successfully.
  - All recognized and/or registered student organizations, are given **100 free flyer prints for designs created within the Student Union Marketing Department**. Contact Kailey Bookout for more details.

- Policies, procedures and timelines:
  - 2 week minimum timeframe
  - Please see handout for other project timelines

- Online marketing request: http://lcl.okstate.edu/projectrequest

- Once your event is finalized, do some research on what you hope your event to portray.
  - Thoughts to consider:
    - What is the purpose of the event?
    - Who are you trying to reach?
    - How will your audience benefit from your event?
  - How to explain your expectations in the project request:
    - Be descriptive
      - Example: “I would like to incorporate OSU colors, an image of the Student Union, and our organization’s logo”
    - Avoid vague terms
      - Example: “I want fun, fresh and funky.”

http://union.okstate.edu

/osuunion

Student Organization Marketing Examples

student UNION
LIFE HAPPENS AT THE UNION

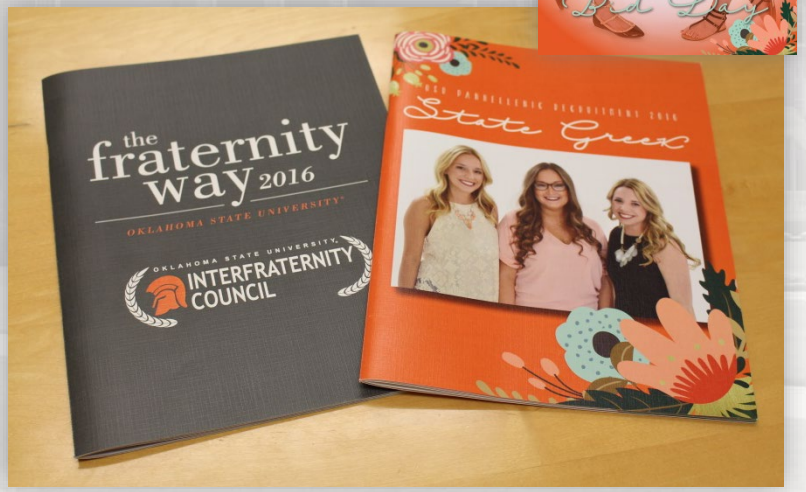
http://union.okstate.edu
/osuunion

Student Organization Marketing Examples

student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

Student Organization Marketing Examples



student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

Leadership and Campus Life

211 Student Union

Travis Herhold

405-744-5486

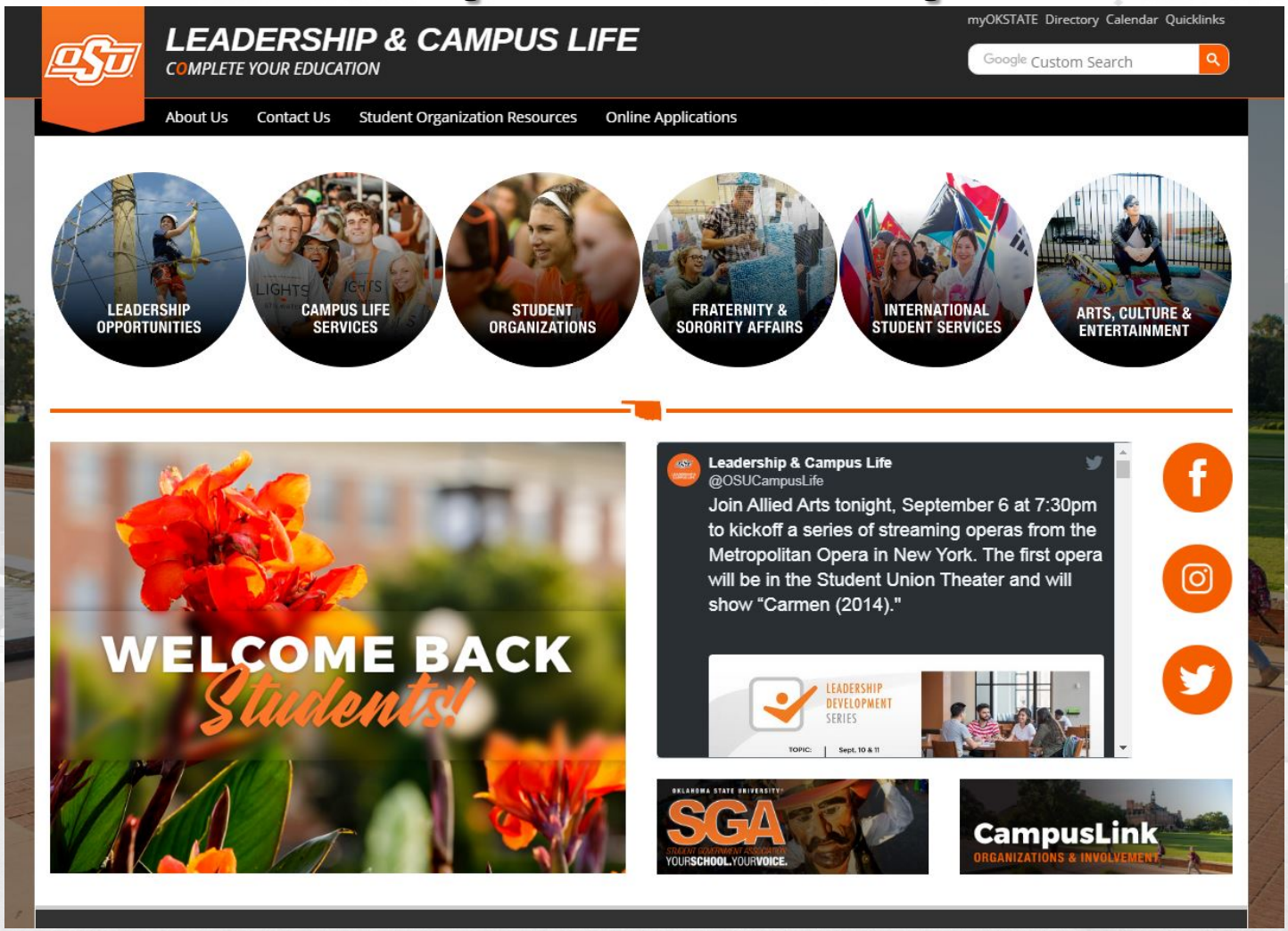
Jessie Hickey

405-744-8045

student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

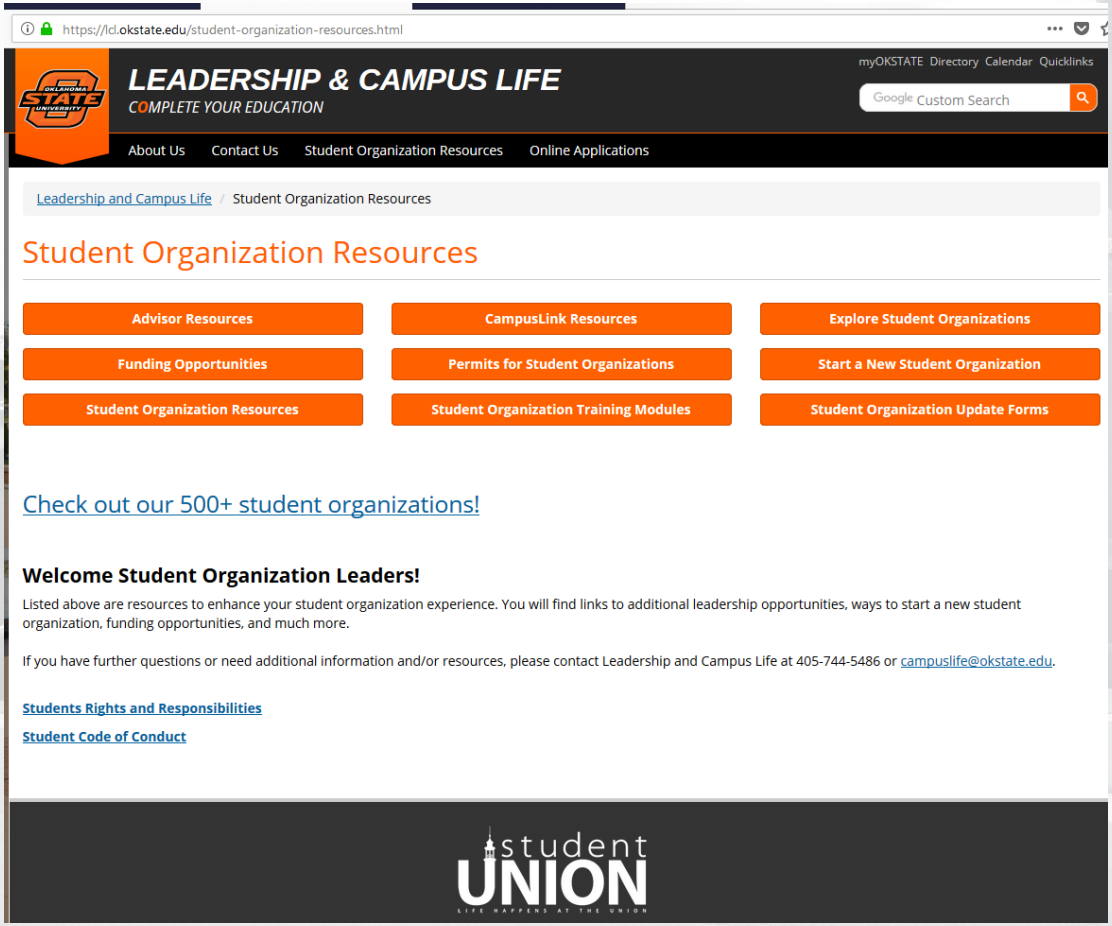
Leadership and Campus Life



student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

Student Organization Resources



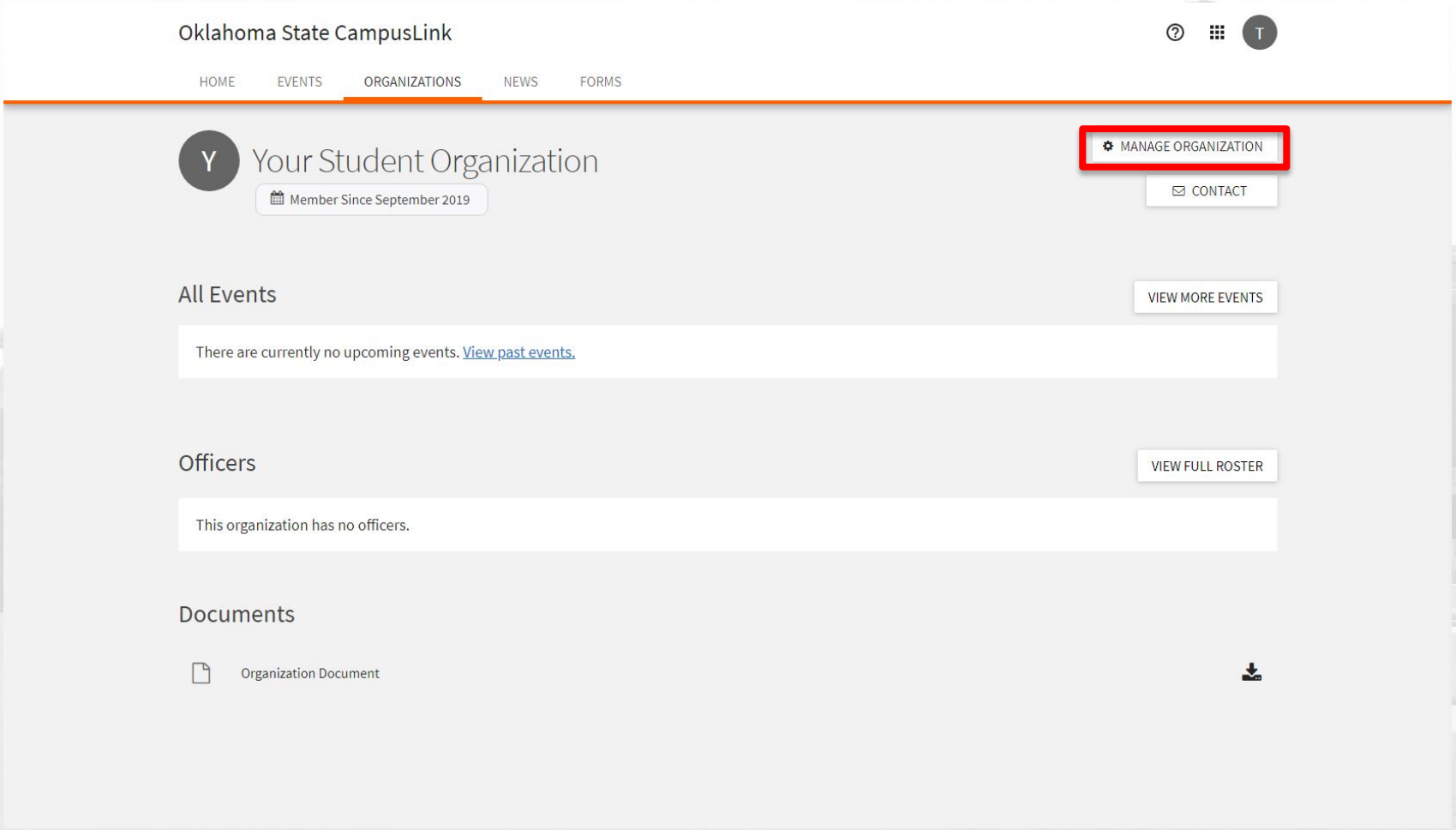
Leadership Training Provided

- StrengthsQuest
- Leadership Development Seminars
- Social Change Model of Leadership
- Ethical Leadership

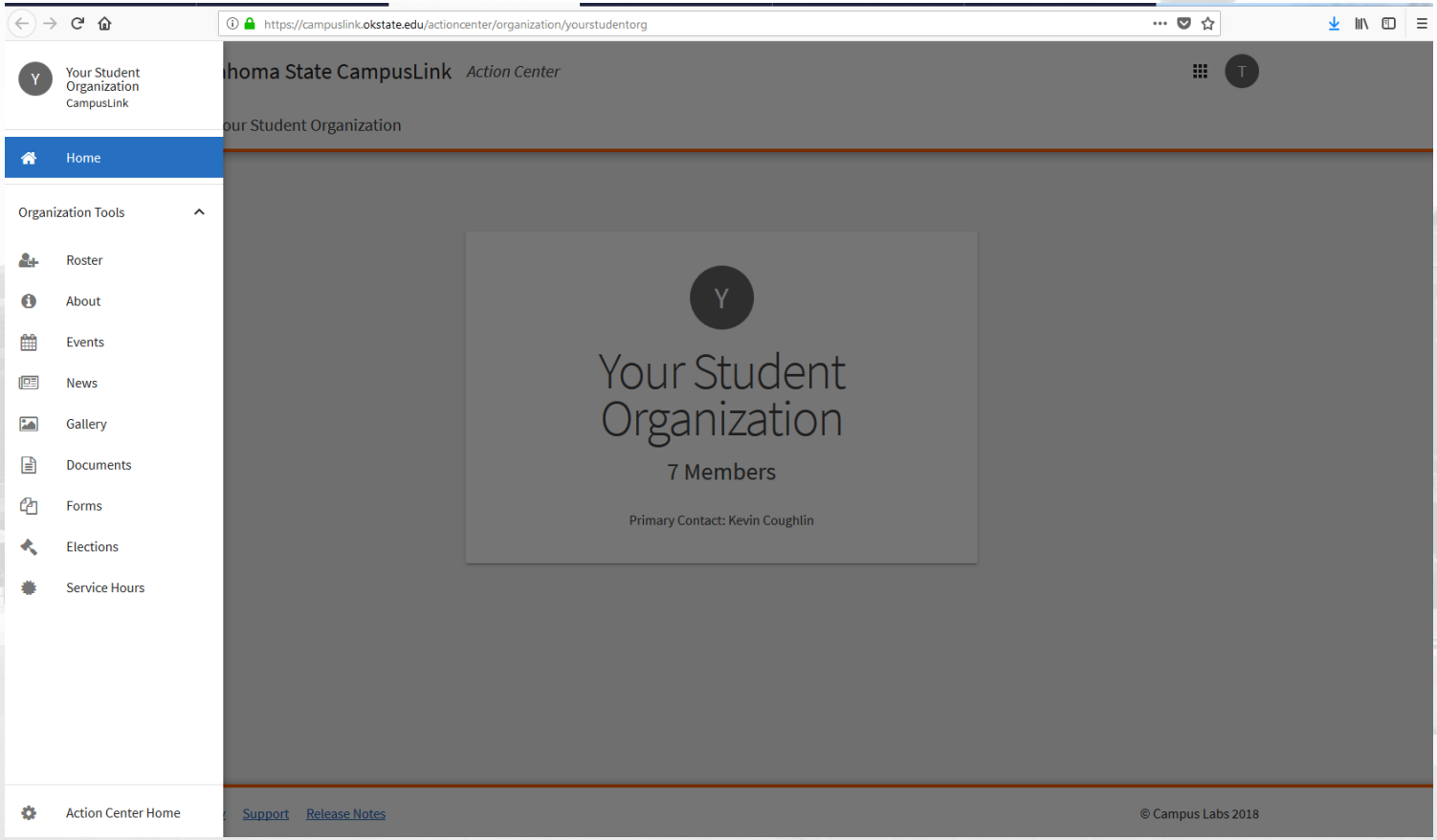
Skills Training Provided

- Goal Setting
- Learning Outcomes
- Mission and Vision Statements
- Branding
- Transitioning Information
- Fundraising Basics

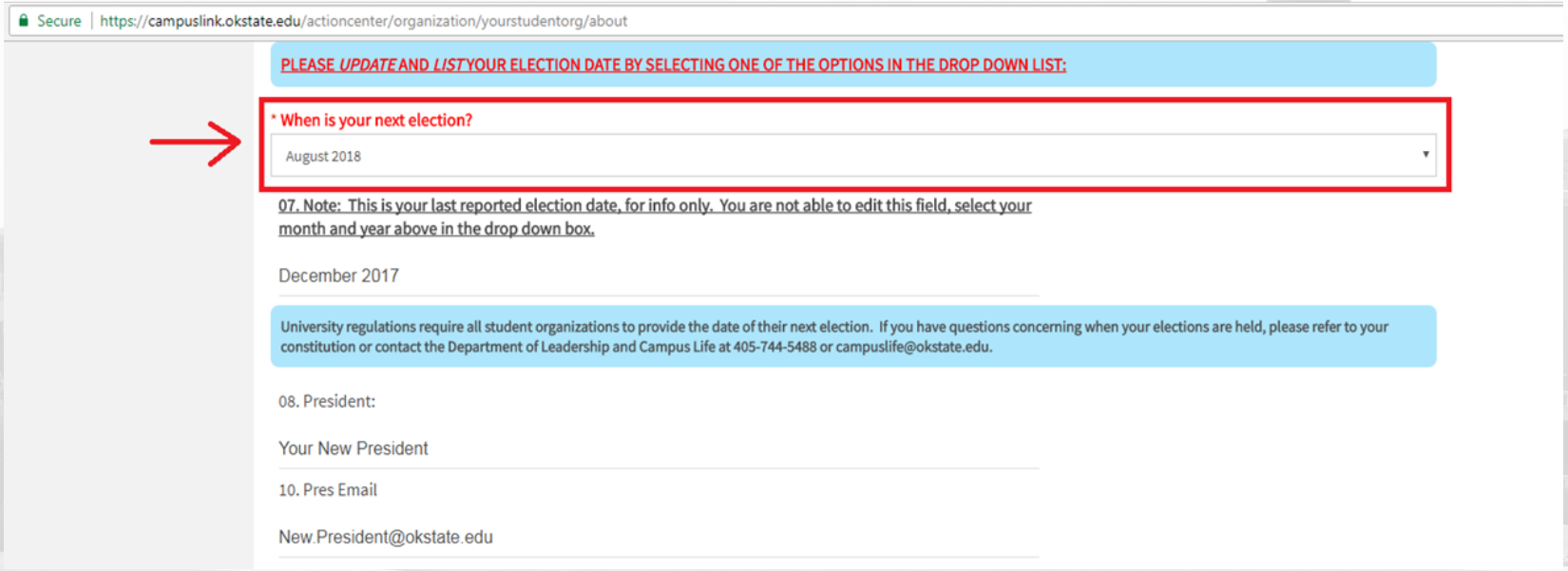
Updating CampusLink



Updating CampusLink



Updating CampusLink



Organization Status

Active Organizations: Registered or recognized organizations have all of the rights of a student organization – room reservations, posting fliers, AFAP Funding (recognized), OSU email, and University Accounting

Frozen Organizations: Do not have current information on CampusLink. The organization will not be visible on CampusLink. Members will not have student organization privileges

CampusLink- Documents

Place important documents on CampusLink within your “Documents ” folder.

These documents should contain:

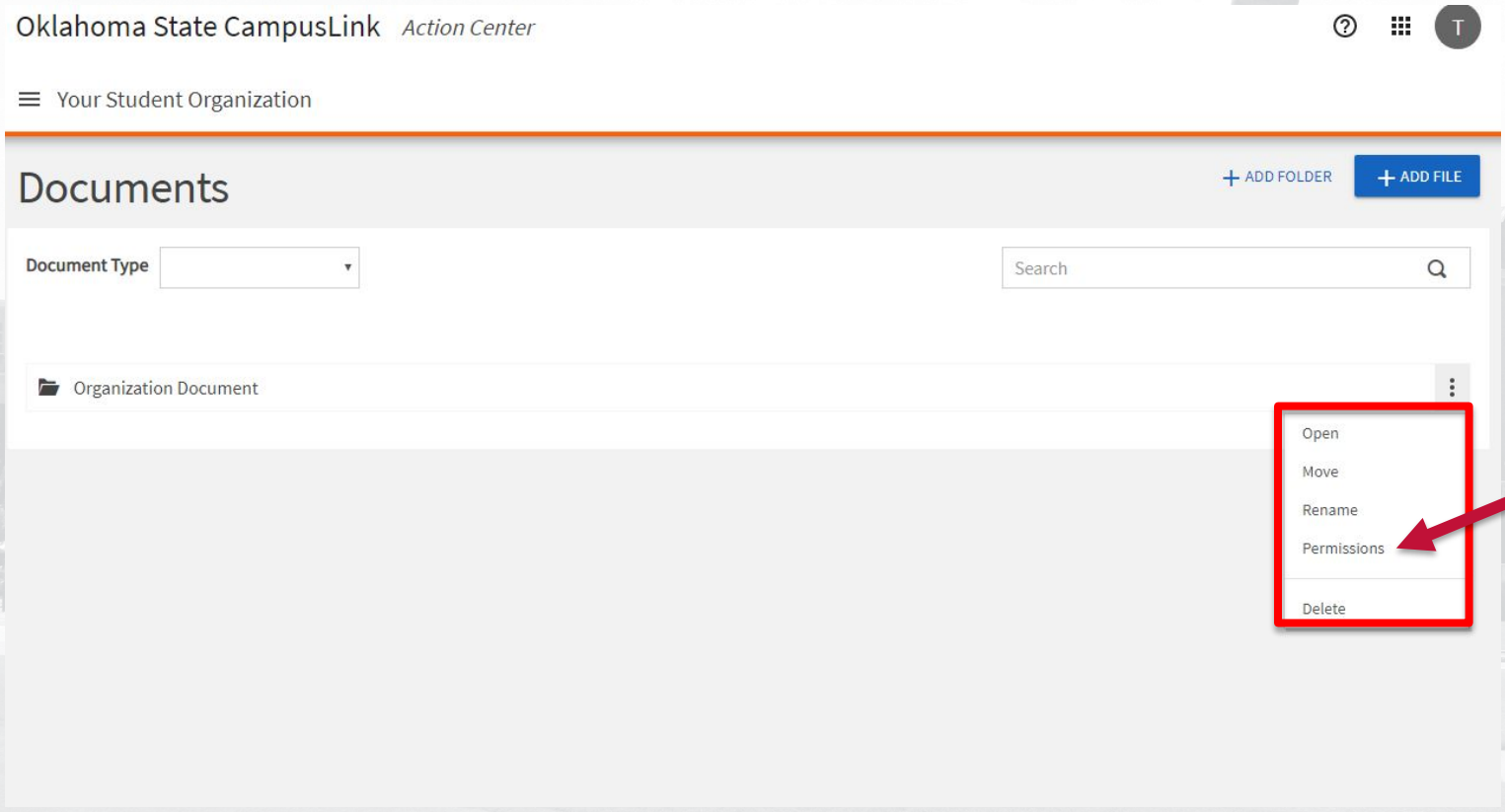
Organization Constitution

Organization Minutes

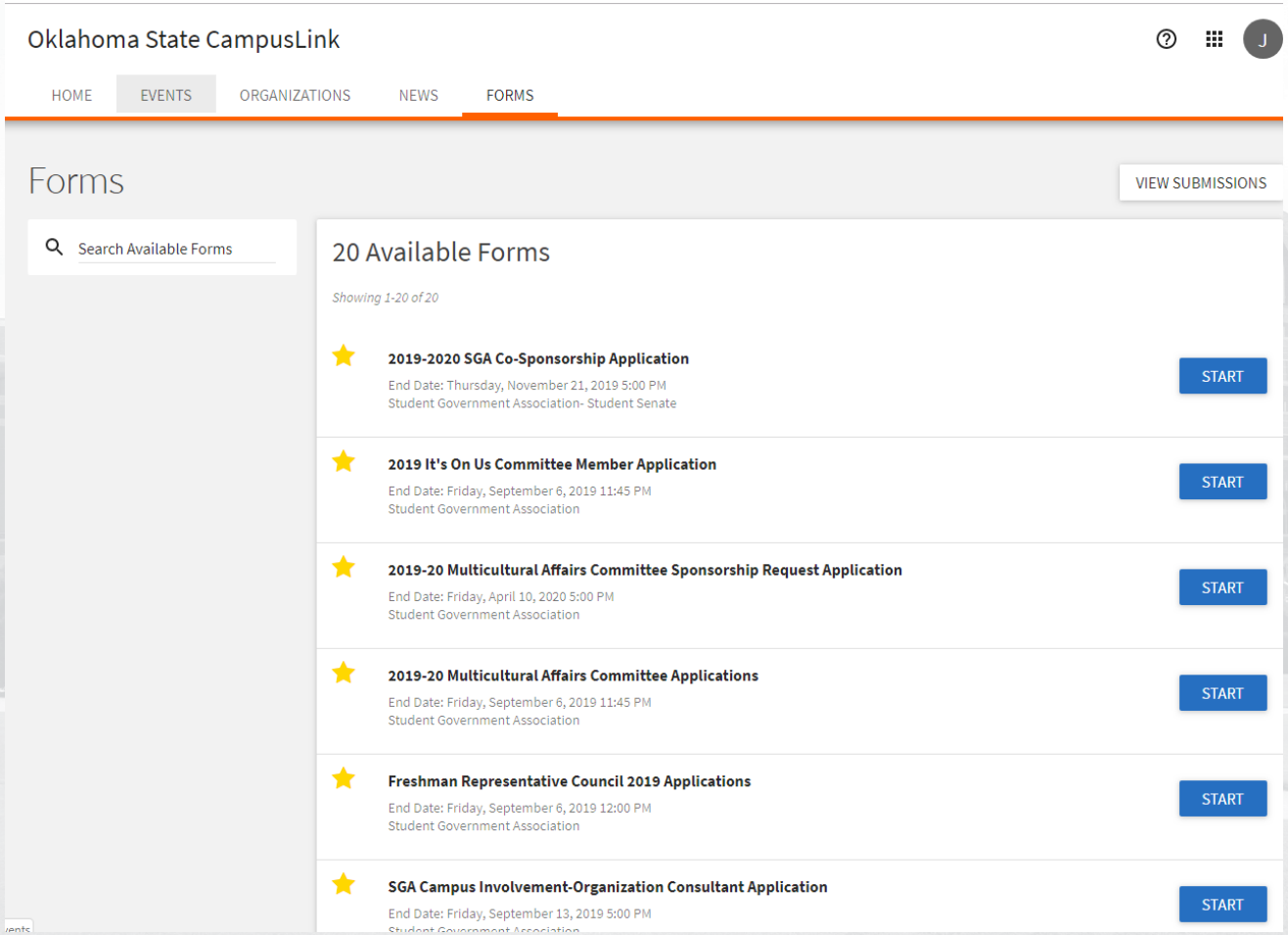
Group Contact List

Applications, Letters, etc.

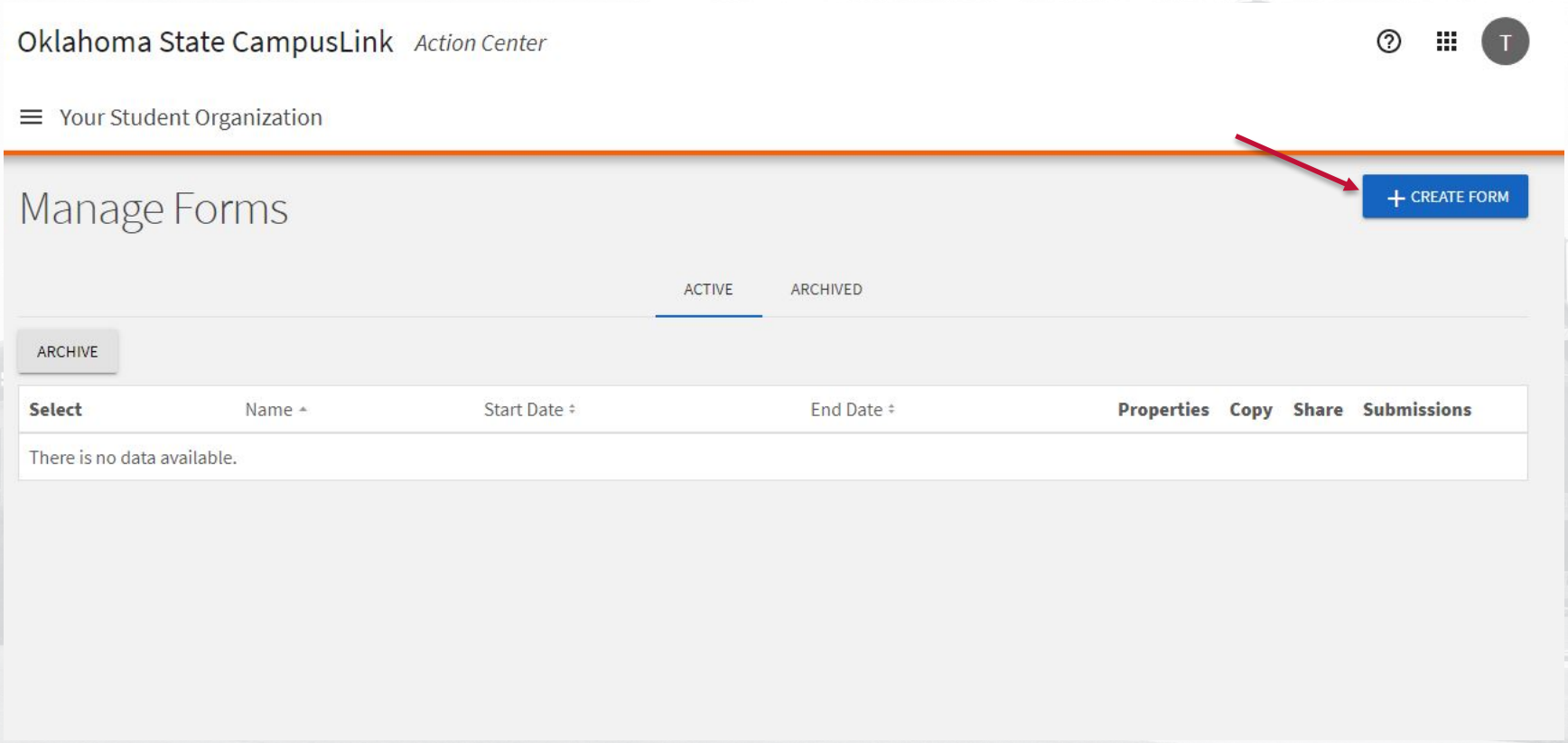
CampusLink - Documents



CampusLink - Forms



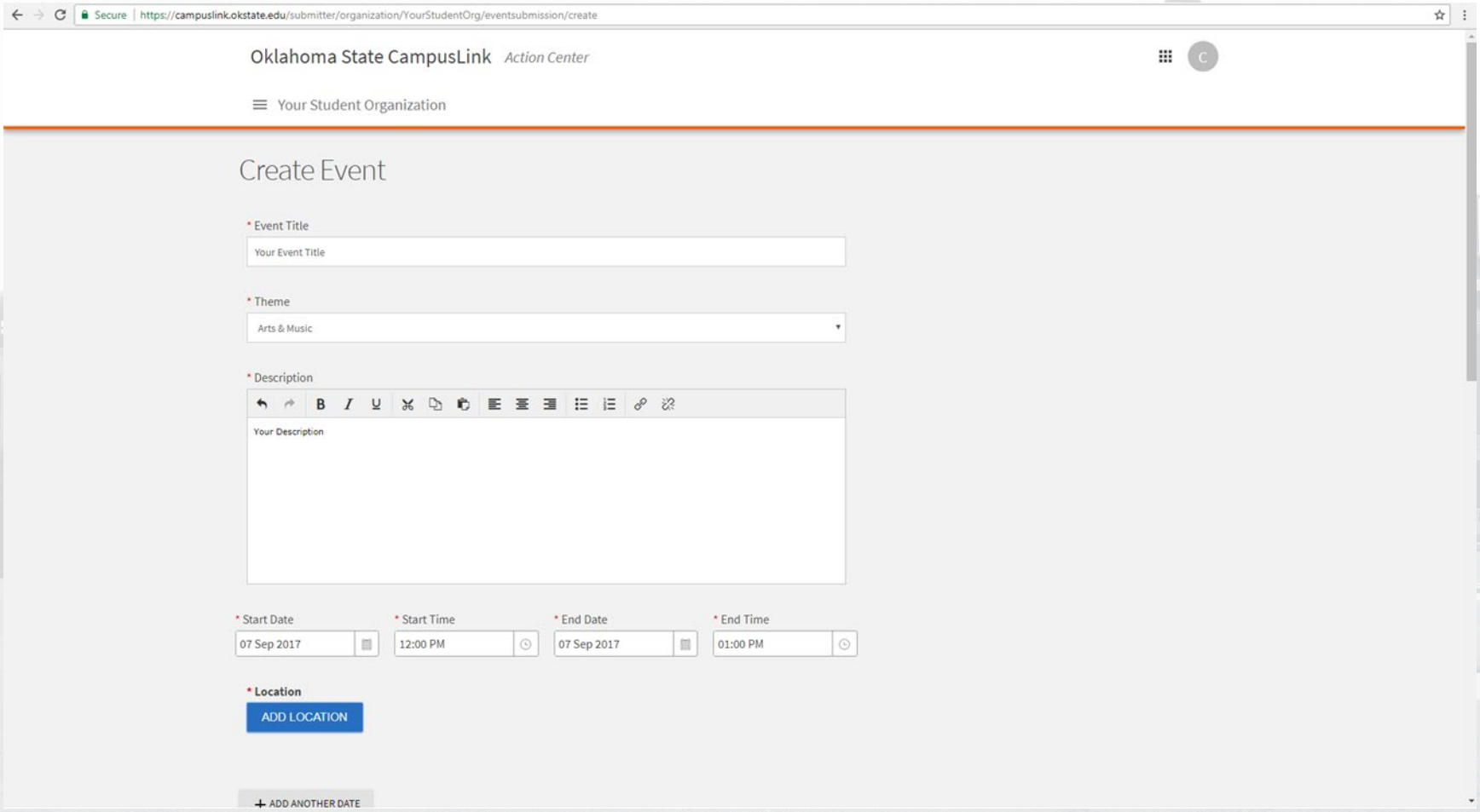
CampusLink - Forms



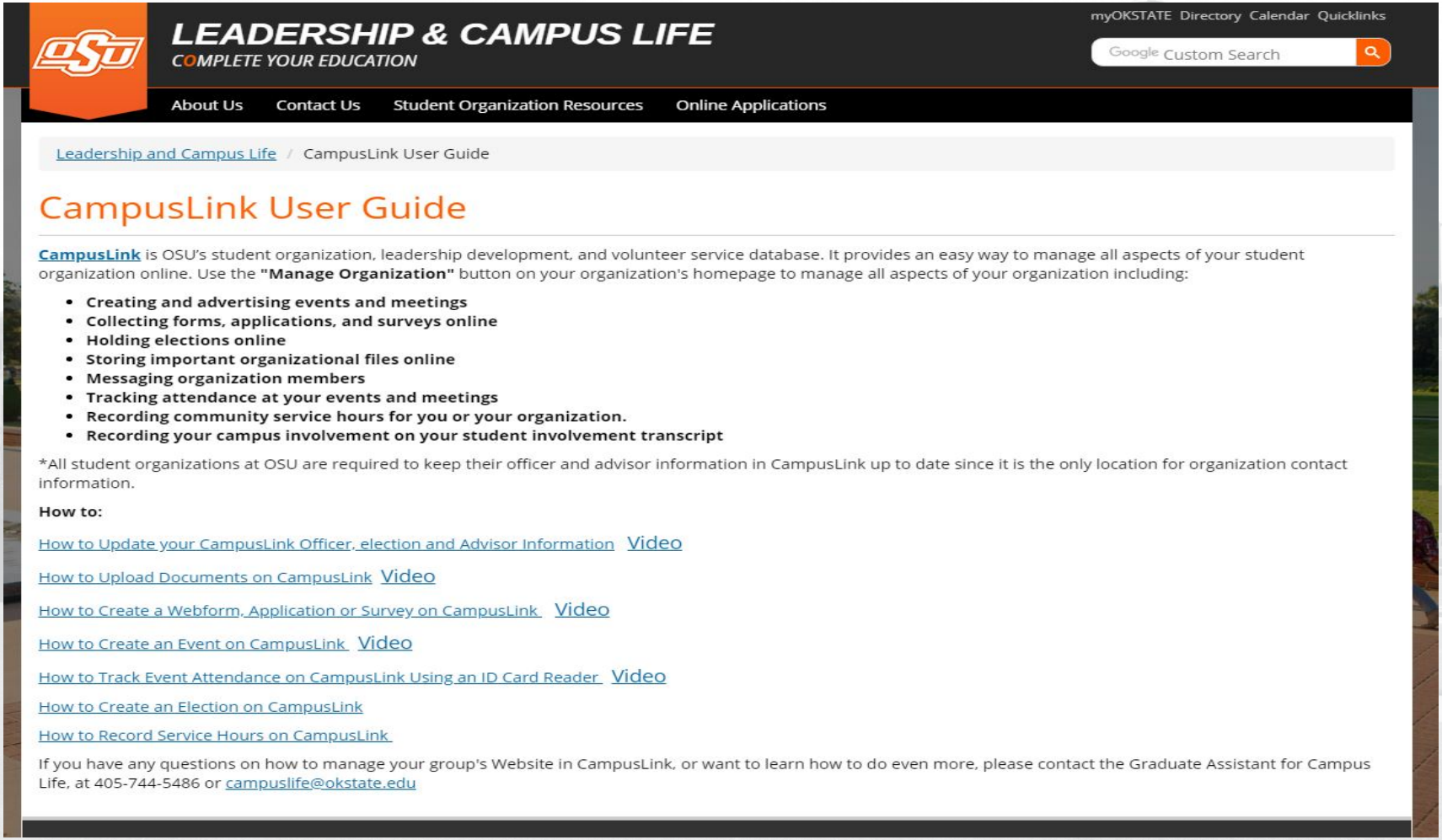
CampusLink- Create an Event

- Event Flyer Size – 1024px by 600px or larger
- 10mb limit
- Must be JPEG, JPG, GIF, PNG, and PDF
- All materials created by marketing complies with regulations

CampusLink- Create an Event



CampusLink User guide



LEADERSHIP & CAMPUS LIFE
COMPLETE YOUR EDUCATION

myOKSTATE Directory Calendar Quicklinks

Google Custom Search

About Us | Contact Us | Student Organization Resources | Online Applications

Leadership and Campus Life / CampusLink User Guide

CampusLink User Guide

CampusLink is OSU's student organization, leadership development, and volunteer service database. It provides an easy way to manage all aspects of your student organization online. Use the **"Manage Organization"** button on your organization's homepage to manage all aspects of your organization including:

- **Creating and advertising events and meetings**
- **Collecting forms, applications, and surveys online**
- **Holding elections online**
- **Storing important organizational files online**
- **Messaging organization members**
- **Tracking attendance at your events and meetings**
- **Recording community service hours for you or your organization.**
- **Recording your campus involvement on your student involvement transcript**

*All student organizations at OSU are required to keep their officer and advisor information in CampusLink up to date since it is the only location for organization contact information.

How to:

How to Update your CampusLink Officer, election and Advisor Information Video

How to Upload Documents on CampusLink Video

How to Create a Webform, Application or Survey on CampusLink Video

How to Create an Event on CampusLink Video

How to Track Event Attendance on CampusLink Using an ID Card Reader Video

How to Create an Election on CampusLink

How to Record Service Hours on CampusLink

If you have any questions on how to manage your group's Website in CampusLink, or want to learn how to do even more, please contact the Graduate Assistant for Campus Life, at 405-744-5486 or campuslife@okstate.edu

https://lcl.okstate.edu/campuslink-user-guide.html

Student Volunteer Center

211 Student Union

volunteer.center@okstate.edu

student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

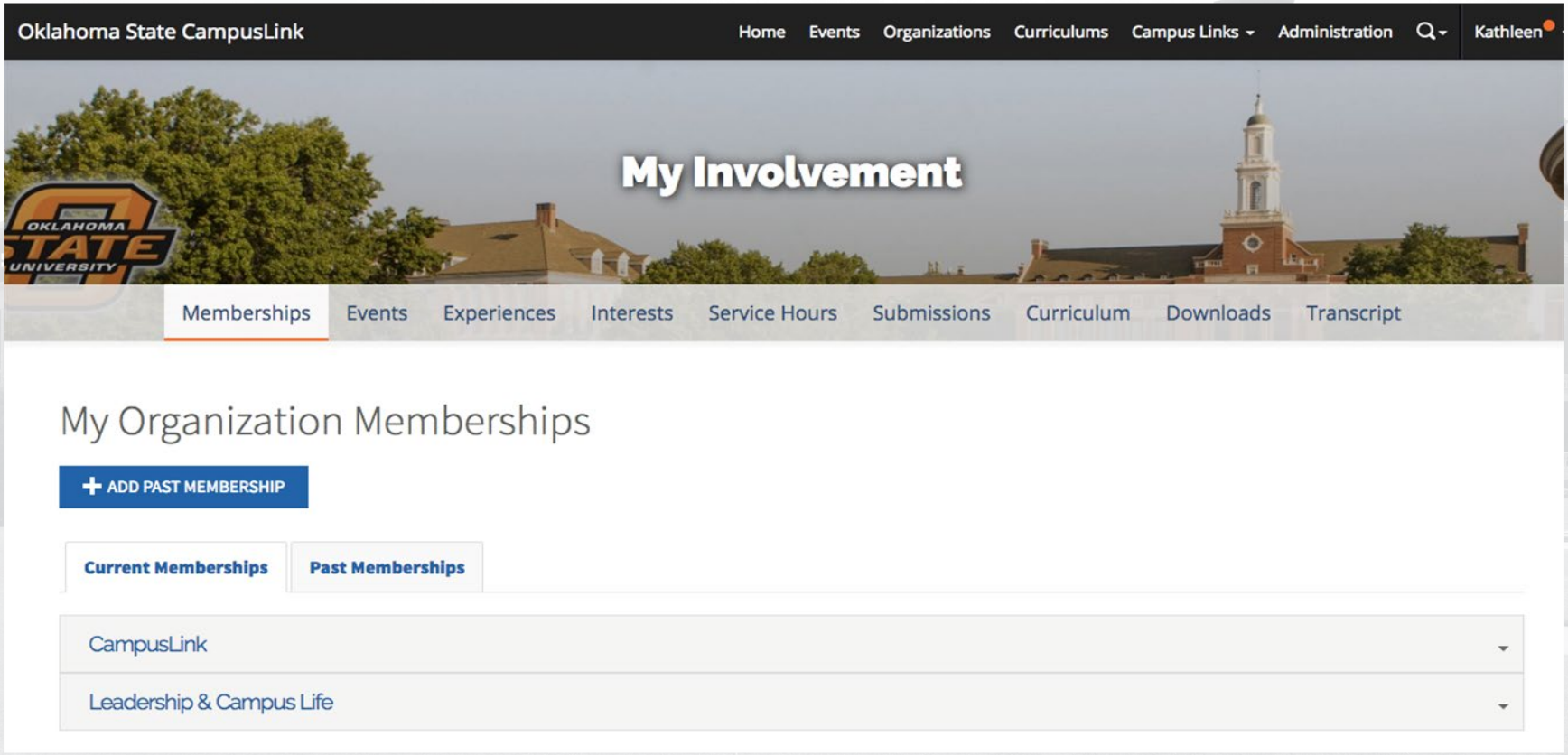
Student Volunteer Center

CORD Program:

- 400 Hours of Community Service as an Undergraduate
- 300 Hours of Community Service as a Graduate Student
- All Hours Must Be Reported in CampusLink
- There has been a total of 998,023 service hours reported in CampusLink to date!

Record Your Service Hours on CampusLink

Go To: My Involvement

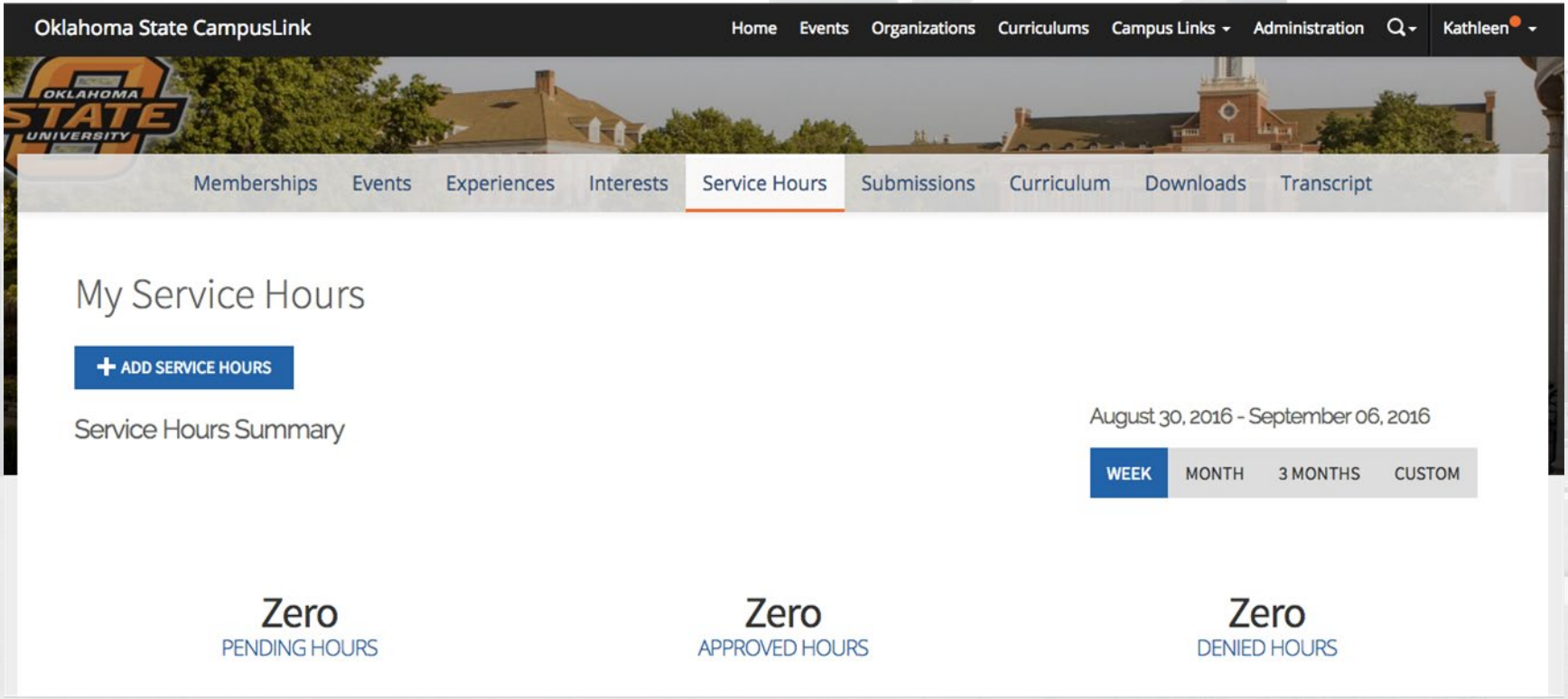


student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

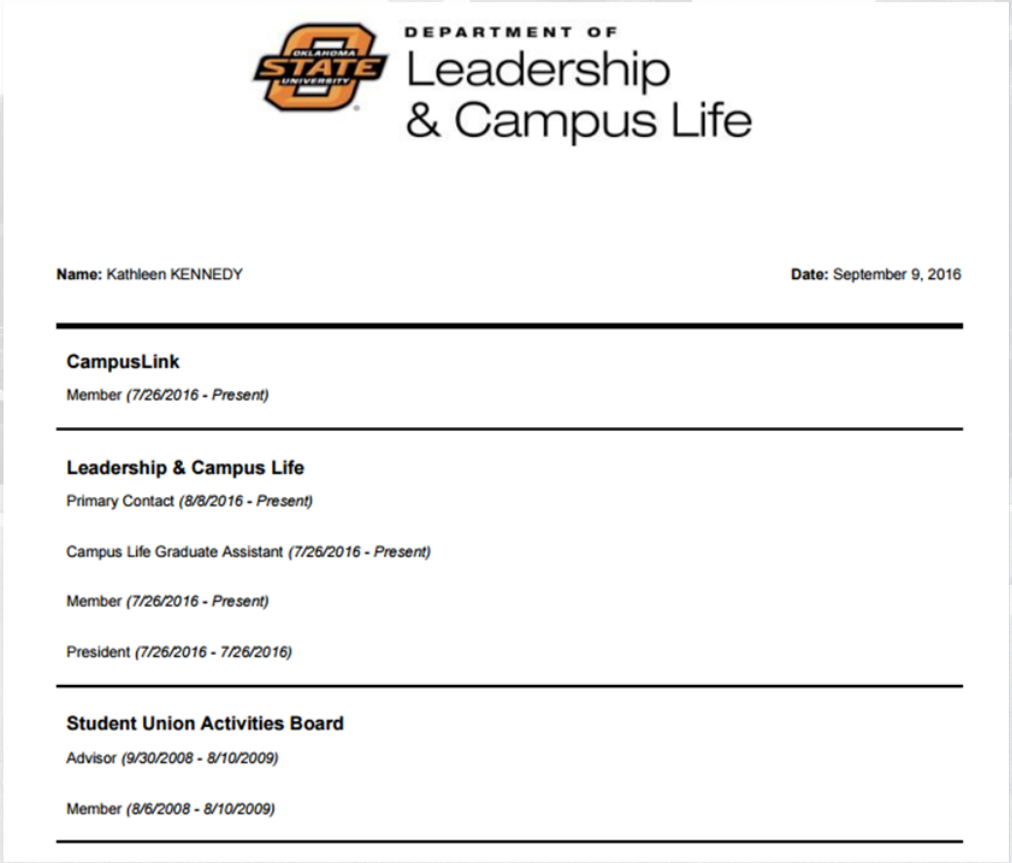
Record Your Service Hours on CampusLink

Go To: Service Hours + Click Add Service Hours



CampusLink Transcript

tracks all of your service hours and organizational involvement



DEPARTMENT OF
Leadership
& Campus Life

Name: Kathleen KENNEDY **Date:** September 9, 2016

CampusLink

Member *(7/26/2016 - Present)*

Leadership & Campus Life

Primary Contact *(8/8/2016 - Present)*

Campus Life Graduate Assistant *(7/26/2016 - Present)*

Member *(7/26/2016 - Present)*

President *(7/26/2016 - 7/26/2016)*

Student Union Activities Board

Advisor *(9/30/2008 - 8/10/2009)*

Member *(8/6/2008 - 8/10/2009)*

student UNION
LIFE HAPPENS AT THE UNION

http://union.okstate.edu
/osuunion

Questions?