

**SLI DATABASE MANUAL
FOR
COLLEGE OF FORESTRY
RECOGNIZED STUDENT
ORGANIZATIONS
UPDATED: SPRING 2019**

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INTRODUCTION

What is SLI? “SLI” stands for [Student Leadership & Involvement](#). It’s an office on the OSU campus that promotes leadership development and manages organizations such as the Center for Civic Engagement, the Orange Media Network, Late Night Programs, the Global Community Kitchen, the Craft Center, and (most importantly), the [OSU Student Clubs and Organizations](#).

- SLI hosts the University-wide student clubs and organizations database.
- They administer rules and regulations surrounding recognition as a club on campus.
- They provide student access to the SLI database onto which student clubs record their activities.

The [SLI database](#) (commonly referred to in-person as “SLI”, although in the manual it will always be “SLI database”) is the platform through which student clubs and organizations are recognized by the University, keep track of member and officer lists, record meetings and activities, request funding from the College or University, search for volunteer opportunities, and communicate with the SRE and SLI Offices. Although it is often referred to as a “headache”, the SLI database is vital to the University system, *and is mandatory for student clubs and organizations to maintain.*

This manual is an attempt to make the SLI database less of a headache for officers in the OSU College of Forestry Student Clubs and Organizations. Good luck!

P.S. The check mark indicates descriptive information. The round bullet point indicates process information.

P.P.S “The SRE Office” refers to the College of Forestry Student Resources & Engagement Office in Snell 133.

MEMBERS AND OFFICERS

- ✓ Member and officer lists *must* be kept updated and accurate on the SLI database.
- ✓ Members can be added in two ways:
 - ✓ Manually, by officers that have access to the club’s page in the SLI database, or
 - ✓ By self-selecting to join via the “+ Join Now” button in [database of clubs](#). A request for confirmation/approval will be sent to the club’s SLI page.
- ✓ Officers can only be added manually by existing officers. Make sure to add the new officers before the existing officers (who have access to the SLI database) leave in the Spring!
- ✓ The member/officer lists include the faculty and staff advisors for your club.
- ✓ Use the “Add/Update Member” to access the entire member and officer list.
- ✓ Use the “Add/Update Officer” to filter the list to just the officers.
- ✓ This process can also be done through the Organization Setup window, outlined in the Organization Setup heading on page 24 - 28.



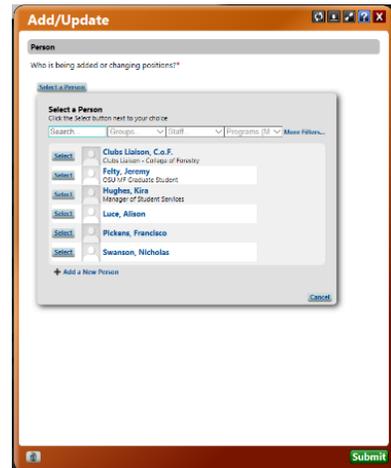
To begin

- Select “Add/Update [Member or Officer, depending on which list you want to access]” from the green box on the dashboard. It has a people icon next to it.
- Click “Select a Person” in the new window to open another new window (gray).



To add

- Click “+ Add a New Person” at the bottom of the gray window.
- Type the last name into the green search box and click “Search”.
- Click “Select” next to the name.
- Check the appropriate position.
- Click “Submit”.



To update

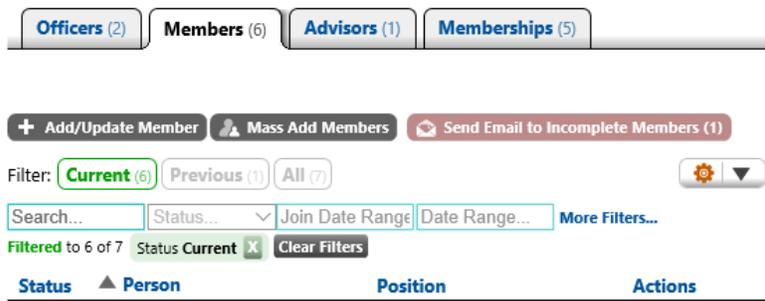
- Click “Select” next to the name.
- Check the appropriate position.
- Click “Submit”.

To access the member and officer lists

- From the club dashboard, click “Members” with the little ID badge icon next to it.



- Members and officers can be added or updated from here as well.
 - Click the “+ Add/Update Officer” or “+ Add/Update Member” from the tabs to access the same process outlined above.
 - Click the “Mass Add Members” under the members tab to access information on adding large numbers of members via the “+ Join Now” button or the “unique member registration URL” given in the popup window.
- The option also exists to send a reminder email to new members or officers who have not yet confirmed their position within the club.



ANNUAL RECOGNITION

- ✓ The Annual Recognition tab is used to concisely track the clubs recognition status throughout the years.
- ✓ Clicking on the tab will open a window showing the date, club name, and submitter of the annual recognition application.
- ✓ Annual recognition is a firm requirement through OSU for maintaining club status as a [Recognized Student Organization](#) at OSU and sponsorship through the College of Forestry.
- ✓ Failure to submit an annual recognition application by the Fall term deadline will result in the termination of the club – so don't forget!



MEETINGS

- ✓ Meetings should be recorded for a variety of reasons on the SLI database:
 - ✓ It helps to keep the club organized and provides a calendar visible to all officers.
 - ✓ It allows the Student Resources & Engagement Office to keep tabs on how active the club is (more active = more funding and better relationships with SRE!).
 - ✓ It is the main source of information for potential new members looking at the club through the [SLI club database](#).
 - *Try this:* Go onto the [SLI club database](#), search for your club, and see what information is available to potential brand-new members. Does your page include upcoming meetings and events with all the relevant information? Does your page include links to the [club webpages](#) or the Facebook page? Does your page have an interesting and inviting “About Us” section? Would you join this club based on the SLI database page?
- ✓ Recording meetings also includes recording minutes (typically the responsibility of the Secretary).
- ✓ There are two types of meetings available on the SLI database:
 - ✓ *General meetings* are meetings that all club members and any potential new members are invited to. They show up on the public calendar. If a meeting reminder is sent through the SLI database, it will be sent to everyone on the member and officer lists.
 - ✓ *Executive meetings* are meetings that only the club officers are invited to. They do not show up on the public calendar. If a meeting reminder is sent through the SLI database, it will be sent only to the officer list.

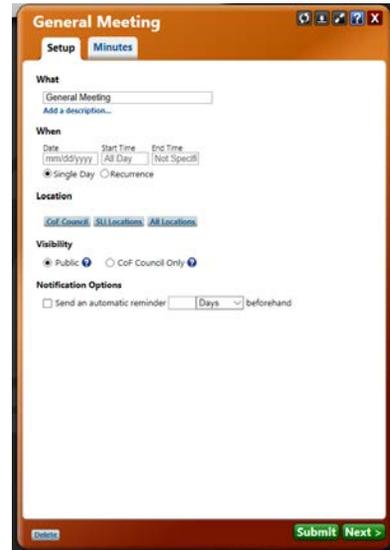
To begin

- Select “New Meeting” from the green box on the dashboard. It has a people icon next to it.
- OR, select “[General or Executive] Meetings” from the dashboard and select “+ New [General or Executive] Meeting”. See page 9 for more details.
- Select which type of meeting to create, based on who’s invited. This will open a new window.



New Meeting setup

- Click “Add a description...” beneath the “What” header. Add a short description of the agenda here.
 - What will be discussed in the meeting? Should members attend the meeting for details on an upcoming trip? Will a schedule for a separate activity be determined? Is the club taking on a new project that will be discussed at the meeting? Are t-shirts being distributed at this meeting? Will free food be available? Who should they contact for more information?
- Fill in the date, start time, and end time.
 - There is an option to set a reoccurring meeting schedule. Take advantage of this!
- Add a location.
 - Select “All Locations”, and then “+ New Location” at the bottom of the gray popup window.
 - Select the appropriate type of room from the “Type” box (usually a classroom).
 - Type the abbreviated or full hall name, plus the room number into the “Name” box.
 - Click “Create New Location”.
- Select “Public” or “Private” – hover over the blue and white question marks to learn more.
- Check the box for “Notification Options” if you want an automatic reminder sent out before the meeting. If this is a general meeting, a reminder will be sent out to everyone on the member and officer lists. If this is an executive meeting, a reminder will only be sent out to the officers.
- Click “Next >”

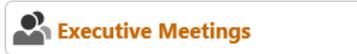


New Meeting minutes

- ✓ If the meeting hasn't happened yet (e.g. you set a reoccurring schedule), there won't be any minutes to upload.
 - ✓ If the meeting has already happened and it's being added retroactively, upload the Word document or PDF file of the meeting minutes.
- Click "+ New Minutes" to upload the document.
 - Fill in the date, upload the document, and click "Create Minutes" in the green box.
 - Click "Submit" to save the meeting and meeting minutes.



- Meetings can be accessed and edited through the "[General or Executive] Meetings" tab on the club dashboard. Both tabs have a people icon next to them.



- The "Meetings" page shows current, future, and past information about the type of meeting, the location, the date, when the minutes were uploaded, who created the meeting, and other categories.
 - To customize the categories, click the orange cog in the upper right corner.
- A new meeting can be created from this page by clicking "+ New [General or Executive] Meeting" and following the instructions on page 8.



To upload minutes to an existing meeting (e.g. one that was set on a reoccurring schedule)

- Click the desired meeting under the "What" category on the meetings page.
- Click the "Minutes" tab at the top of the new window.
- Follow the instructions above.

ACTIVITIES

- ✓ The creation of an activity plan is a great way to encourage collaboration between officers! For example, the Secretary may be in charge of beginning the plan, while the Treasurer may create the budget, and the Vice-President may organize the travel section. This type of collaboration is especially important for large events. Having multiple people working together makes both the activity and the activity plan much easier to manage.
- ✓ Activity plans *must* be created in the SLI database *at least two weeks prior to every activity or event*. This gives SLI and CoF time to review the activity, accept or deny any requests for funding, arrange for motorpool if necessary, ensure that waivers are in place and details are set, and advertise the event to other clubs or CoF students as applicable.
- ✓ Activity plans/reports are the avenue through which the club requests to use funding awarded at the start of the school year through the [CoF Council of Student Organizations](#).
- ✓ Activity plans/reports can also be used to request [SORCE funds through the University](#).
- ✓ BUT! Activities must still be planned/reported through the SLI database *even if no Council or SORCE funding is used*.
- ✓ Like the meetings, activity reports are used by the SRE Office to track club activities.
 - ✓ More active = more funding and more awareness of club efforts across the College.
 - ✓ SRE monitors for activities required to maintain membership in the Council.
 - ✓ It may feel burdensome at the time, but it's necessary. Your club is representing the CoF and the CoF is sponsoring the activity – they have a right to know the details.
- ✓ There are two components for activities in the SLI database:
 - ✓ The *activity plan* is the initial presentation of the activity/event/trip. It includes all the details and is more extensive than the activity report. *It must be submitted at least two weeks prior to every activity or event*.
 - ✓ The *activity report* is the follow-up analysis of the activity plan. It only becomes available after the activity date has passed, and includes retrospective questions about the planning and execution process. *It must be submitted within two weeks of the activity or event*.
- ✓ A list of past and upcoming activities, with the option to print pre-made reports, is available from the “Activities” tab on the dashboard.


 Activities

Good luck!

To begin

- Click “Activity Plan/Report” in the green box on the club dashboard. It has a pushpin icon next to it. This will open a new window for the activity plan.
- The new window has a series of tabs on the left side. Each tab will be covered in its own section in this manual.
- A list of past and upcoming activities is available through the “Activities” tab on the dashboard, with a flag icon next to it.



Setup

- ✓ The *Setup* tab asks for the basic details of the event. It is a place to set the activity name, time, date, audience, goals, and general logistics. Answering questions on the *Setup* tab will open more tabs on the left where applicable. The image shown to the right is of an SLI activity plan will *all* the possible tabs open at once. Your activity may or may not need all these tabs open, and answering the *Setup* questions will determine that.



Activity

- Add the activity name.
- Add the date and time.
 - Like the meetings, there is an option to set a recurrence time and date for an event. This is useful for events that the club regularly hosts or participates in that would not be considered meetings.
 - For example, logging sports practice would be reoccurring activity.
- Add a detailed description of the event.
 - More detail = better relationships with SRE and more likely to be funded!
 - This is especially important for multi-day events or events that require travel.
 - Collaborate with the Council Representative to include language specific to the [CoF Council of Student Organizations](#) requirements. For example, if an activity counts towards the membership drive requirement, include this detail in the activity description.
- Add a brief promotional description. This description will be visible on the [SLI club database](#) page to potential new members.
- Select which categories the event falls under. The categories selected may vary greatly by event.
 - Talk to the CoF Clubs Liaison if you have any questions the categories.

Intended Audience

- Select the target audience and fill in the expected attendance.

Intended Audience

What is the intended audience for this activity?*

Student Leadership and Involvement Members Only

Open to General Public

How many total people do you expect to attend?*

Excluding OSU Students, will individuals under the age of 18 performing or volunteering for the activity?*

Yes No

Goals

- Fill in the activity goals. If this activity is intended to fulfill a [Council membership requirement](#), keep in mind the specific language used in the [Council constitution](#) to describe the goals of the required activities.
- Demonstrate how the success of the activity will be measured.
 - For example, a recruitment or fundraising activity could be measured by the number of new members or the dollar amount raised.
 - For example, a community service activity could be measured by how many of the club members attended and the overall impact made.

Goals

What are your goals for this activity?*

How will you measure success of your goals?*

Logistics

- **Hosting:** The club is hosting the event if the club is *entirely* in charge of arranging it. For example, SAF hosts the SAF Job Fair each year, but FUSE does not host a mill tour. Attending an event is not the same as hosting it. Please contact the CoF Clubs Liaison if you need additional clarification for a specific event.
 - Selecting “yes” to the hosting question will not open any new tabs.
 - Selecting “no” to the hosting question will create a clarifying question below. Fill in the name of the individual or organization who is hosting the activity or event.
- **On-campus:** Please note that Peavy Arboretum counts as “on campus”.
 - Selecting “yes” opens a prompt to select a campus location. A unique email address is automatically generated and intended to be used to reserve locations on campus. If you have already chosen a location, select “yes” and enter the location as prompted.
 - Selecting “no” opens a prompt about travel. If travel is involved outside of Corvallis or using OSU motor pool, select “yes” to the travel question. Selecting “yes” will open a new *Travel* tab on the left.
- **Non-OSU co-sponsors:** Non-OSU co-sponsors are groups or individuals who contribute to the planning or funding of an event with the expectation of being acknowledged as a sponsor.
 - Selecting “yes” will open a short answer box with a request for a description. Enter the co-sponsors name, email, role, and funding amount if applicable.
 - Selecting “no” will not open anything else.
- **Spending money:** Select “yes” to this question, *regardless of whether money is actually being spent*.
 - The SLI database has a glitch – a budget is required for the activity plan to be submitted, and the only way to open the *Budget* tab is to select “yes” to this

Logistics

Are you hosting this activity?*

Yes No

Is this activity on-campus?*

Yes No

Will there be any non-OSU co-sponsors for this activity?*

Yes No

Will you be spending any money in order to make this activity happen?*

Yes No

question on the *Setup* tab. Even if you select “no” and the *Budget* tab never appears, the SLI database will still ask for a budget. Selecting “yes” opens a budget tab and a campus funding tab on the left.

- o Note: Participation Awards as allocated through the CoF Council of Student Organizations is requested through the *Campus Funding* tab, not the *Budget* tab.

Logistics

Resources

- A link is provided to [request borrowable items](#) from OSU. Borrowable items include OSU banners, assorted decorations, easels, tables and table numbers, table décor, lighting, and miscellaneous other items.

Resources

If you need to request to borrow decorations and other items, please use this link: [Borrowing Items from OSU](#)

If you would like to check out games for your activity, visit SEC 108, M-F between 10-4p.

- 1. Setup
- 2. Logistics
- 3. Planning Team
- 4. Travel
- 5. Marketing
- 6. Campus Funding
- 7. College of Forestry
- 8. Budget
- 9. Review

Schedule & Planning Timelines

- Two options are given: either upload a timeline document to the SLI database or create a schedule within the activity plan.
- Click “Select Files to Upload” to upload the timeline/agenda to the activity plan.
- Click “+ Add to Schedule” to add agenda items within the activity plan and create a schedule manually.

Schedule & Planning Timelines

If you have any of the following documents, please upload them here:

- A backwards planning timeline
- Agendas for the day(s) of your activity
- Activity script(s)

[Select Files to Upload](#) or [Drop Files Here](#)

- If your activity is multi-faceted (conference using multiple spaces, event occurring over multiple days, etc.), create a more detailed schedule here.
- This space can also be used to create tasks for the group and to assign individuals to completing the tasks.

Provide a complete schedule for this event. Use the **Add** button below to add new items.

View Mode: List Schedule Calendar

No items have been added to this activity's schedule

[+ Add to Schedule](#)

Planning

- A non-OSU co-sponsor is any entity who is helping to coordinate, plan, or sponsor the activity and is not affiliated with OSU. Selecting “yes” to this question opens a dialogue box with a prompt for more information.
- If people under the age of 18 (and aren’t OSU students) will be performing or volunteering, an additional description is needed in the activity plan.
- The series of yes/no questions under this subsection are intended to give the SLI and SRE Offices an idea of any potential problems that may arise. Please be honest when filling

Planning

Non-University Co-Sponsor
Will there be any non-OSU co-sponsors for this activity?
 Yes No

Minor Participation
Including OSU Students, will individuals under the age of 18 performing or volunteering for the activity?
 Yes No

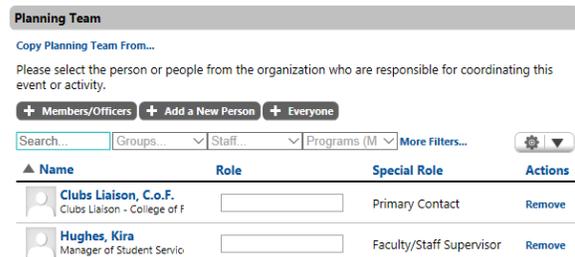
Please answer yes or no to all the following items. *You cannot submit your activity until done.*

- Yes No Amplified Sound
- Yes No Animals
- Yes No Construction
- Yes No Controversial Topics
- Yes No Copyrighted Material
- Yes No Digital Arts
- Yes No Fire
- Yes No Food
- Yes No Performers
- Yes No Performers - Minors
- Yes No Physical Activity
- Yes No Events
- Yes No Vendors
- Yes No VHS

out this section. Selecting “yes” to most of the questions will open a dialogue box and a prompt for more information.

Planning Team

- “Please select the person or people from the organization who are responsible for coordinating this event or activity.”
 - Pretty self-explanatory, yes?
- You are automatically included as the primary contact because you created the new activity plan.
- The club’s Faculty Supervisor is automatically included.
- Add anyone else who is helping plan or organize the event. The selected people will receive invitations to fill out the activity report after the event date. They can also go in and edit the activity plan.
- Including multiple officers on the Planning Team is a great way to encourage collaboration between officers!



Travel

- ✓ The *Travel* tab is opened by selecting “no” to the on-campus question under the logistics heading in the *Setup* tab.



Departure and Return

- Fill in the departure and return dates and times. The times can be an estimate, but the dates must be exact.

Transportation

- Select the mode(s) of transportation that are applicable to the event.
- Each selection will create a new heading at the bottom of the page.
- Click “+ Add [Transportation Method]”
 - Each method of transportation has a different set of questions associated with it in the “+ Add [Transportation Method]” popup.
 - The questions are detailed, so be prepared to spend time filling them out completely.



- The CoF SRE Office strongly encourages clubs to use OSU motor pool over private vehicles for insurance and liability reasons.
- Motor pool cannot bill directly to the clubs' MU Account, so SRE pays for it and then seeks reimbursement from the clubs' Participation Awards. *Please explicitly note exactly how much is being requested for motor pool in the SLI budget.* Fill out the [CoF motor pool request form](#) and talk to [Brooke Harrington](#) in Snell 133 at least two weeks before the activity.

Lodging

- Selecting “yes” to lodging will create a new heading at the bottom of the page.
- Click “+ Add Lodging”
 - Like with transportation, adding lodging will open a popup window with relevant questions, including the reservation number, lodging type and name, address, check-in/out dates, room types, etc.
 - Please have your reservation ready and be prepared to answer these questions!
- Click “Done Editing” to close the popup.
- Click “+ Edit Travelers” to add the people staying at this lodging.

Driving Directions

- If applicable, attach driving directions either as an image or as a link to a Google Map.

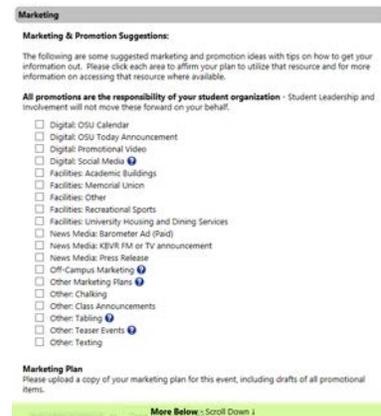
Marketing

- ✓ The *Marketing* tab is intended to help you brainstorm ways to advertise the event both within the club and to the wider College/University. The tab is also intended to help you follow through with the advertising plan.
- ✓ No information on the tab is required, but please consider it anyways.
- ✓ “The following are some suggested marketing and promotion ideas with tips on how to get your information out.”



Marketing & Promotion Suggestions

- Select all of the marketing plans applicable and intended to use for the event.
- Selecting a plan will create a new text box with information on how to best use it.
- Common and easy marketing revenues include:
 - ✓ Digital: Campus Newsletters/Listservs
 - [Fernhopper](#)
 - CoF This Week
 - [CoF Clubs Newsletter](#)
 - Individual club listservs
 - All-club listserv, etc.
 - ✓ Digital: [OSU Calendar](#)



- Also applicable to the [CoF Calendar](#) and the [CoF Clubs Calendar](#).
- ✓ Digital: Social Media
 - Announcements via the club’s Facebook or Instagram account.
 - Contact the Clubs Liaison to add an announcement to the [club’s webpage](#).
- ✓ Facilities: Academic Buildings
 - Placing flyers for events, guest speakers, meetings, or volunteer opportunities in RH, STAG, LINC, Snell, the Library, etc.
- ✓ Facilities: Recreational Sports
 - For example, placing logging sports flyers in Dixon Rec Center.
- ✓ Other: Class Announcements
 - Asking club officers and members to make a brief statement in their classes regarding an event is a good way to spread the word.
 - This method is usually only applicable to large or reoccurring events.
- Talk to the [Clubs Liaison](#) or [Brooke Harrington](#) with help making flyers or announcement sheets, contacting Fernhopper, creating a calendar event, accessing listservs, etc.
- Use the *Marketing Plan* to upload files of flyers, handouts, or other promotional material.

Campus Funding

- ✓ Use the *Campus Funding* tab to request the Participation Awards allocated in Fall term through the CoF Council of Student Organizations.
- If no funding is being used, or if only club money from fundraising (i.e. the money in the MU Account) is being used, select “no”.
- Select “yes” to request funding from your sponsoring unit (College of Forestry through the CoF Council).
- This opens a series of new text boxes at the bottom of the page, each of which references a different source of on-campus funding.
 - ✓ **SORCE**: SORCE funding is requested through the Student Leadership & Engagement office and comes directly from the University. The use of SORCE funds is restricted to those events and activities that align with SLI’s vision and values within one of the “Student Affairs Domains of Learning and Service”.
 - ✓ There are three different types of SORCE funds: SORCE Partnership, SORCE Programs/Events/Activities, and SORCE Organization Development. Each type of funding is used only where applicable to the event. There are information blurbs below each SORCE type – read these to learn more, or reach out to [Danté Holloway](#) with questions.



Campus Funding Options

Would you like to request funding from a department or other entity on campus?*

Yes No

Activity Sponsorship. If you are interested in having a department or unit on campus sponsor an event with more university resources than just funding, please contact Danté Holloway about initiating an Activity Sponsorship Agreement.

Campus Funding Sources

Select on-campus funding source(s) from which you wish to request funds.

Not seeing the funding source you're looking for? Show all available funding sources

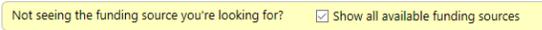
Search:

▲ Source Department

Your Sources	Source	Action
SORCE Partnership	Student Leadership & Involvement	+ Select
<small>A partnership with SU SORCE that provides an allocation of funds towards support of programming that addresses a timely critical issue, an national or nature disaster, participation in a conference/competition requiring travel; a one-time fee associated with establishment of a student organization as a member organization of a regional, national or international organization; or a student organization budget deficit for fundable expenses due to unforeseen circumstance.</small> More Details...		
SORCE Programs/Events/Activities	Student Leadership & Involvement	+ Select
<small>Provides funding resources, development and support for activities on or within 10 miles of the OSU campus that are out of the classroom, student organization sponsored events and activities open to the broader student population for participation, including: cultural exchange and learning, identity and community development, social justice and civic engagement, health and well-being, etc.</small> More Details...		
SORCE Organization Development	Student Leadership & Involvement	+ Select

[More Below - Scroll Down ↓](#)

- ✓ More often than not, you will use the Participation Awards through the CoF Council, or independent club money in your MU Account.
- Select the box next to “Show all available funding sources” in the yellow bar.



- Scroll down about halfway or use the search box to find College of Forestry and click “+ Select”. This opens a new tab on the left.



College of Forestry (Funding)



- ✓ Use the *College of Forestry* tab to request use of the Participation Awards allocated in Fall term through the [CoF Council of Student Organizations](#).
- ✓ Keep in mind the specific Council requirements when requesting use of the Participation Awards.
- ✓ Participation Awards requested through an SLI activity plan must be accepted by the activity plan author in order to be deposited into the club MU Account. Be on the lookout for an email requesting formal acceptance of funds after submitting an activity plan.
- If using motor pool, please note that motor pool cannot bill directly to the clubs’ MU Account, so SRE pays for it and then seeks reimbursement from the clubs’ Participation Awards. To facilitate this process, *please explicitly note exactly how much is being requested for motor pool in the SLI budget*. Fill out the [CoF motor pool request form](#) and talk to [Brooke Harrington](#) in Snell 133 at least two weeks before the activity.

- Type in the *amount requested*.
- Type in the *reason for request*.
 - Specify which event outlined in the Funding Proposal (Fall term) is in this activity plan.
- Type in the activity’s *benefit to CoF and OSU*.
 - Remember to incorporate the language and specific goals for sponsorship outlined in the [Council Constitution](#).
 - How does this event match the intentions of the club and Council when funding was allocated? How does this event demonstrate club commitment to the expectations outlined by the Council?

Funding Request

Amount Requested*
How much are you requesting from College of Forestry?
\$

Reason for Funding*
Why are you seeking funding with College of Forestry?

Department and University Benefit*
How will this activity benefit College of Forestry and OSU?

Budget

- ✓ Like many of the other tabs, the *Budget* tab is in place to both ensure the club is considering every expense and income type, and to provide CoF and the University access to the details of the event.
- ✓ The *Budget* tab becomes especially important if CoF is sponsoring the activity – they have a right to know all the details.
- ✓ Even if CoF is not directly sponsoring the activity, forming a budget is good practice and shows a high level of responsibility in the club. It is also useful for the Treasurer as they



form the term-based and annual end-of-year expenses and activities reports for the SRE Office. The more detail you include along the way, the easier it is to compile it all at the end.

- If using motor pool, please note that motor pool cannot bill directly to the clubs' MU Account, so SRE pays for it and then seeks reimbursement from the clubs' Participation Awards. To facilitate this process, *please explicitly note exactly how much is being requested for motor pool in the SLI budget*. Fill out the [CoF motor pool request form](#) and talk to [Brooke Harrington](#) in Snell 133 at least two weeks before the activity.

Resources

- The SLI database provides two resources on the *Budget* tab:
 - ✓ *Developing a Budget*: Includes a series of questions designed to prompt a careful consideration of the budget, as well as an Excel template for budgeting events. This resource is especially useful for larger events.
 - ✓ *Managing a Budget*: Includes helpful tips on keeping track of actual expenses and ensuring the event stays within the established budget.

Resources

Click one of the links below to view some documentation that will help you with developing and maintaining your budget.

[Developing a Budget](#)

[Managing a Budget](#)

Budget

- The budget section begins with a few paragraphs of information and instruction on using the budget tool in the SLI database. Read it!
- Depending on if you requested use of the Participation Awards, your budget will look one of two ways:
 - The standard activity budget

This is an empty budget. Start by clicking the *New Category* button below to add categories of Income and Expenses to the budget.

[+ New Category](#)

- The split budget, with the option to toggle between a “Master Budget” and “CoF Budget”
- The amount requested under the *College of Forestry* tab will be automatically included in both the Master Budget and CoF Budget.

Master Budget
College of Forestry

This is an empty budget. Start by clicking the *New Category* button below to add categories of Income and Expenses to the budget.

[+ New Category](#)

- Both types of budgets request essentially the same information: Income and Expenses.
 - ✓ *Income* is any source of money available to the club. This typically includes club money in the MU Account and CoF funding in the form of Participation Awards through the [CoF Council of Student Organizations](#).
 - ✓ *Expenses* are any of the costs associated with the event, regardless of whether the club is hosting the event or not. Expenses could include registration fees and traveling for outside events, or venue and food costs for inside events.
- Click “+ New Category” to open a popup list of common sources of income and expenses.
- It’s your choice how to go about developing the budget. Some find it easier to begin with income (e.g. the set amount from the Participation Awards), while others find it easier to begin with expenses (e.g. set cost of travel or catering). Either way, select a category that is applicable to the activity
- ✓ For a *standard activity budget* (i.e. no request for Participation Awards and therefore no option to toggle between the Master and CoF Budgets), continue reading. For a *split budget* (i.e. request for Participation Awards and the resulting option to toggle between budgets), see page 21.



Standard Budget

- Click “+ New Category” and select an income or expense.
- A line item will be created with a text box to fill in the planned amount.
- Click “Open Budget” to open a popup window for easier access.
 - The popup window will have options to add transactions, categories, and print.
 - It will automatically keep track of planned expenses in the yellow box, and update the actual expenses in the green box when the post-activity report is submitted within two weeks after the activity.
 - The line items in the lower half of the window will update automatically as well.



Planned	Actual
Income \$0.00	Income \$0.00
Expenses \$0.00	Expenses \$0.00
Difference \$0.00	Difference \$0.00

- Adding a *category* updates the planned expenses and income. Every expense and income should be included in the “planned” budget.
- Adding a *transaction* updates the actual expenses and income. Expenses and income that have already been used (e.g. the hotel that has been paid for already) should be included in the “actual” budget as a transaction.
- See below for an example of a balanced budget including both planned and actual income and expenses.

✓ This budget balances! Income matches expenses.

+ New Transaction + New Category Print

Name...	Planned	Actual	Actions
Income			
Club Money	\$ 23	\$12.00 +	Remove
Expenses			
Pizza	\$ 23	\$12.00 +	Remove
	Income \$23.00 Expenses \$-23.00 Difference \$0.00	Income \$12.00 Expenses \$-12.00 Difference \$0.00	

- Even if no money is spent on an item, please include it in the budget. An example of a \$0 budget for logging sports is shown below.
 - ✓ This shows that although the activity may not cost anything, there are still “expenses” used by the club.
 - ✓ It shows responsibility and accountability, and conveys thoughtfulness in the planning process.
 - ✓ In addition, it shows that if you *were* to pay for anything unexpectedly, it would come from the club MU Account.
 - ✓ Please include detail when submitting a \$0 budget. If no detail is included, it could be easy for the reviewers to assume by the \$0 was a typo, and you may get an email saying “did you really mean to have a \$0 budget?” Including the details up front makes the whole process easier and faster.

+ New Transaction + New Category Print

Name...	Planned	Actual	Actions
Income			
Club Money - if we need to buy anything, we'll use the MU Account.	\$ 0	\$0.00 +	Remove
Expenses			
Supplies - we already have saws and chaps for Logging Sports Practice.	\$ 0	\$0.00 +	Remove
Venue - we can use the arena at no charge.	\$ 0	\$0.00 +	Remove
Transportation - we can take our own cars or carpool.	\$ 0	\$0.00 +	Remove
	Income \$0.00 Expenses \$0.00 Difference \$0.00	Income \$0.00 Expenses \$0.00 Difference \$0.00	

- To edit the category name and include more details, either:
 - Click “+ New Category” and fill in the name, or
 - Click the existing name, click “Edit...” in the popup window, and fill in the details there.

Split Budget

- ✓ A split budget is created by selecting “yes” on the *Campus Funding* tab, and then filling in the requested amount in the *College of Forestry* tab. The amount is automatically filled into the Master Budget.
- The process of creating new line items is the same as outlined above.
- When you select “Open Budget”, two tabs will be available in the popup window:
 - ✓ Master Budget: Includes both the College of Forestry funding request (Participation Awards) *and* “other sources” (e.g. club money for extra expenses that the Participation Awards do not cover, like meals).
 - ✓ College of Forestry: Includes *only* the amount requested from the College.
 - ✓ Money requested through the College will only appear as “planned” until the activity plan is submitted and approved. The “actual” expenses and income will be unbalanced until then.
- ✓ Note that the “Master Budget” tab includes both College of Forestry funding *and* other sources organized in different columns.
- ✓ The College of Forestry funding remains “planned” until the activity plan is submitted and approved. The “actual” budget will be unbalanced at the time of submission. For pre-paid (“actual”) expenses (e.g. hotels, flights, registration fees, etc.), the Participation Awards will act as a reimbursement to the club MU Account.
- ✓ Please try to be realistic about the other expenses that will be accrued during the event.

Master Budget		College of Forestry																					
+ New Transaction + New Category Print																							
Name...																							
				<table border="1"> <tr><th colspan="2">Planned</th></tr> <tr><td>Income</td><td>\$128.00</td></tr> <tr><td>Expenses</td><td>\$50.00</td></tr> <tr><td>Difference</td><td>\$78.00</td></tr> </table>	Planned		Income	\$128.00	Expenses	\$50.00	Difference	\$78.00	<table border="1"> <tr><th colspan="2">Actual</th></tr> <tr><td>Income</td><td>\$50.00</td></tr> <tr><td>Expenses</td><td>\$128.00</td></tr> <tr><td>Difference</td><td>\$-78.00</td></tr> </table>	Actual		Income	\$50.00	Expenses	\$128.00	Difference	\$-78.00		
Planned																							
Income	\$128.00																						
Expenses	\$50.00																						
Difference	\$78.00																						
Actual																							
Income	\$50.00																						
Expenses	\$128.00																						
Difference	\$-78.00																						
Category	College of Forestry	Other Sources	Total Planned	Actual	Actions																		
Income																							
Funding Request Example Plan	\$78.00		\$78.00	\$0.00	N/A																		
Club Money - Meals		\$ 50.00	\$50.00	\$50.00	+ Remove																		
Expenses																							
Registration Fees	\$ 78.00	Add...	\$78.00	\$78.00	+ Remove																		
Meals	Add...	\$ 50.00	\$50.00	\$50.00	+ Remove																		
	Income \$78.00 Expenses \$78.00 Difference \$0.00		Income \$128.00 Expenses \$50.00 Difference \$78.00	Income \$50.00 Expenses \$-128.00 Difference \$-78.00																			

College of Forestry (Nov 8, 2018)

+ New Transaction + New Category Print Edit Budget...

Planned	Actual
Income \$78.00	Income \$0.00
Expenses \$78.00	Expenses \$78.00
Difference \$0.00	Difference \$-78.00

Name...

Category	Planned	Income	Expenses	Actual	Actions
Income					
Funding Request Example Plan	\$78.00	\$0.00	\$0.00	\$0.00	N/A
Expenses					
Registration Fees	\$ 78.00	\$0.00	\$78.00	\$78.00	+ Remove
	Income \$78.00	\$0.00	\$78.00	Income \$0.00	
	Expenses \$-78.00			Expenses \$78.00	
	Difference \$0.00			Difference \$-78.00	

- ✓ Note that the “College of Forestry” tab includes *only* the requested funding.
- ✓ It remains “planned” until submission and approval. The “actual” budget will be unbalanced at the time of submission.
- Answer the additional details about the activity budget.

Additional Details

Please answer yes or no to all the following items. You cannot submit your activity until done.*

Yes No Cathbox ?
 Yes No Philanthropy ?
 Yes No Raffles/Gaming ?
 Yes No Tickets ?

Review

- ✓ Almost done! The final tab of the activity plan is the review stage. A heading is in place for each major item in the plan, with a synopsis of the information you provided. Please read through it carefully and correct any changes before submitting the activity plan.
- ✓ The plan will go through a review process by both the Student Leadership & Involvement Office, and the College of Forestry Student Resources & Engagement Office.
 - It may take up to two weeks for the plan to be reviewed and approved. Any funding through the College or the University will not be released until the plan has been approved (which is why it’s important to submit the activity plan at least two weeks in advance!).
- ✓ The activity plan can be edited after the submission/approval process and after the activity date has passed in the Post-Activity Report.

1. Setup
2. Logistics
3. Planning Team
4. Travel
5. Marketing
6. Campus Funding
7. College of Forestry
8. Budget
9. Review

POST-ACTIVITY REPORT

- ✓ Once the activity plan has been reviewed and approved, and the activity date has passed, the post-activity report will open.
- ✓ The post-activity report is intended to prompt a review of the planning and implementation process from the perspective of the club leaders and planning team.

- The Post-Activity Report will be available as a tab on the submitted activity plan. It can be accessed by:



- Clicking on the activity under the “Activities” tab on the club dashboard, or



- Clicking on the red “Action Required” ribbon also on the club dashboard. The ribbon only appears when an action (like the post-activity report or approving membership positions) is needed.



- The post-activity report asks a series of simple questions designed to make you think about the planning process on a personal level.
- Be honest! This is a chance for self-reflection. You will not be penalized in any way for saying you would've done something differently.

 A screenshot of a "Post-Activity Report" form for an activity titled "Logging Sports Practice". The form includes a "Not Submitted" status, event details (Oct 14-Dec 9, 2017), and several sections of questions:

- Planning Committee/Timelines**: A reminder to summarize the event and evaluate its effectiveness.
- Advance Planning***: A question about how many weeks in advance planning began, with radio button options: 10 weeks or more, 8-10 weeks, 6-8 weeks, 4-6 weeks, and Fewer than 4.
- Ideal Planning Timeline***: A question about what changes would be made if the event were planned again, with radio button options: Begin planning 3+ weeks earlier next time, Begin planning 1-3 weeks earlier, Keep the same planning timeline, Less planning time is needed, and Other: (with a text input field).
- Planning Committee***: A question about how many people were actively contributing to the planning, with radio button options: 7 or more and 6.

 At the bottom of the form are "Previous" and "Save and Close" buttons.

ORGANIZATION SETUP

- ✓ The Organization Setup tab contains all the basic information about the club and the most recent governing documents.
- ✓ Clicking on the dashboard icon opens a new window that allows edits to the club description, email, contacts, logos, constitution, demographics, etc.
- ✓ The window also includes officer, member, advisor, and alumni lists and the option to “+ Add/Update” as explained in the Members and Officers section on pages 5 and 6.
- ✓ There are 5 tabs available on the left: 1 tab about Organizational Setup, and 4 tabs about members and officers. The Organizational Setup tab includes two “sub-tabs”: Setup and Vocab.



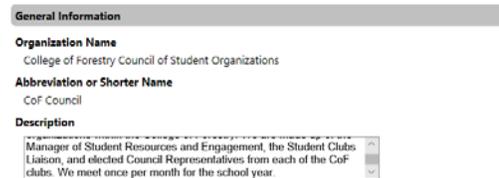
General/Organization Setup

- ✓ The General/Organization Setup tab includes all the basic information about the club.
- ✓ (Almost) all information included in the Organization Setup window is visible on the [SLI club database](#) to potential new members. It is the first impression for members browsing the database, so consider carefully what messages you want to send!



General Information

- Includes the club name and abbreviation, which cannot be edited until the next annual recognition.
- Includes a text box for the club description, which can be edited. The club description appears on the [SLI club database](#), and acts as the first source of information for potential new members.
 - *Try this:* Go onto the [SLI club database](#), search for your club, and see what information is available to potential brand-new members. Does your page include upcoming meetings and events with all the relevant information? Does your page include links to the [club webpages](#) or the Facebook page? Does your page have an interesting and inviting “About Us” section? Would you join this club based on the SLI database page?



Contact Information

- Includes:
 - club email address (automatically assigned and cannot be changed),
 - the forwarding email address (cofstudentclubs@oregonstate.edu),
 - the organization phone number (541-737-4670, the Snell 123D phone number),
 - the organization address,
 - and the mailing address (Snell 123D, Oregon State University).

Contact Information

Organization Email Address
"College of Forestry Council of Student Organizations" <cofstudentclubs@oregonstate.edu>

Forwarding Email Address
cofstudentclubs@oregonstate.edu [Edit](#)

Organization Phone Number
5417374670 [Edit](#)

Organization Address
Empty [Edit](#)

Mailing Address
Empty [Edit](#)

Primary Contact

- The primary contact for the organization should be the current president of the club.

Primary Contact*

Please select the primary contact for your organization.

 **C.o.F. Clubs Liaison** CoF Clubs Liaison (Officer) [Remove](#)
Clubs Liaison - College of F Since Oct 9, 2018

[+ Select a Primary Contact](#)

Goals

- The year-long goals are submitted in the annual recognition and cannot be changed.

Goals

2018/2019 Goals

1. Facilitate inter-club coordination, communication, and administration.
2. Provide resources to further the development of student clubs and their members.

Branding

- This section refers primarily to the club logo and links to [webpages](#) or Facebook pages. Email subject prefix and organization color are included as well.
- Take advantage of the *links* section! Use this to connect to the [club webpages](#) and the club social media pages.

Branding

Organization Logo

[Select a File to Upload](#) or [Drop a File Here](#) 

The logo includes the name of the organization

Links

[http://undergrad.forestry.or](#) [Description](#) [Remove](#)

[http://](#) [Description](#) [Add](#)

Color

None [Change...](#)

Email Subject Prefix 

Empty [Edit](#)

Demographics

- Selecting an *open* membership means that people can add themselves as members by clicking the “+ Join Now” button on the [SLI club database](#), pending approval from an officer for formal admittance.
 - For example, Forestry Club is open to anyone, and anyone may self-select membership through the “+ Join Now” button. However, recognized membership is dependent on the officers of Forestry Club approving the membership based on a sign-in sheet at meetings or participation in woodcuts and logging sports.
- Selecting a *closed* membership means that people must be added manually by officers using the process outlined in the Officers and Members heading on pages 5 and 6.



- For example, the CoF Council of Student Organizations is technically open to anyone, but officers and members must be added manually by the Clubs Liaison because the Council Representative is an elected position within the individual club. People cannot self-select to be members.

Categorization

- The categorization heading is intended to provide a way of filtering the 380+ student organizations at OSU based on the interests, goals, and main “themes” of the club.
- CoF clubs typically fall under
 - Environment & Sustainability
 - Academic & Professional
 - Leisure & Hobby
 - Recreation & Sports
 - Etc.
- Talk to the Clubs Liaison if you have any questions about categorization!

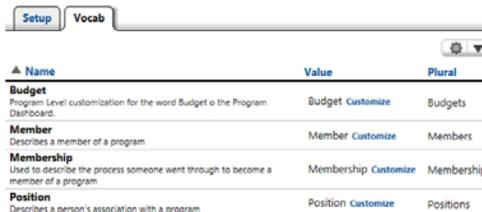


Documents

- The club constitution, bylaws, and any other governing or helpful documents are uploaded here.
- The most recent constitution must be uploaded and submitted every year with the annual recognition, and it should be updated when new changes are made.
- Be aware that although the SLI office reads through the constitutions to approve annual recognition, they do not check for CoF-specific requirements. Please talk with Kira Hughes or the Clubs Liaison about meeting the CoF constitution requirements.
- The constitution and other documents are not visible to potential new members.

Vocab

- ✓ The Vocab tab under Organization Setup provides the option to rename certain words within the SLI database for your convenience.



Officers

- Officers can be tracked, added, removed, and updated from this tab following the same process outlined in the Members and Officer heading on pages 5 and 6.
- Clicking the orange cog on the right-hand side will open a list of options, including:
 - Download a spreadsheet of officers
 - Print a report of selected groups
 - Customize the visible fields
 - Add a filter
 - Save a custom report



Members

- Members can be tracked, added, removed, and updated from this tab following the same process outlined in the Members and Officer heading on pages 5 and 6.
- Clicking the orange cog on the right-hand side will open a list of options, including:
 - Download a spreadsheet of members
 - Print a report of selected groups
 - Customize the visible fields
 - Add a filter
 - Save a custom report



Advisors

- Advisors can be tracked, added, removed, and updated from this tab following the same process outlined in the Members and Officer heading on pages 5 and 6.
- Clicking the orange cog on the right-hand side will open a list of options, including:
 - Download a spreadsheet of advisors
 - Print a report of selected groups
 - Customize the visible fields
 - Add a filter
 - Save a custom report



Alumni

- Alumni can be tracked, added, removed, and updated from this tab following the same process outlined in the Members and Officer heading on pages 5 and 6.
- Clicking the orange cog on the right-hand side will open a list of options, including:
 - Download a spreadsheet of alumni
 - Print a report of selected groups
 - Customize the visible fields
 - Add a filter
 - Save a custom report



+ Add/Update Alum

No alumni have been added to this organization

PEER EDUCATOR CONTACTS

- ✓ The Peer Educators are a group of student workers in the [Student Leadership & Involvement Office](#).
- ✓ Each student organization at OSU is assigned a Peer Educator upon the completion of their annual recognition process.
- ✓ The Peer Educator contact information for your club is available on the club dashboard.

GROUP SERVICE HOURS

- ✓ Select “Report Group Service Hours” from the green box on the dashboard. It has a clock icon next to it.
- ✓ Selecting the icon opens a new window titled “New Service Hour Record”.
- ✓ While there is no firm requirement for an organization to log a certain number of group service hours, recording the time is a good way to convey responsibility and an effort towards public outreach to the SLI and SRE Offices. Most clubs do some sort of volunteer work and it needs to be recorded as an activity anyways, so it doesn’t hurt to record it here as well!



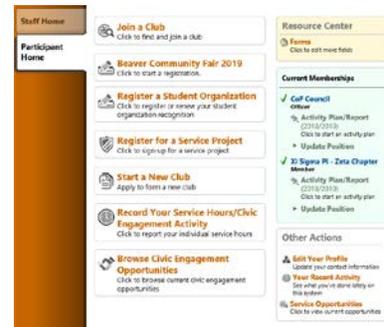
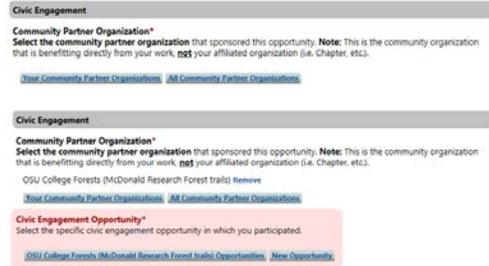
Submitter Information

- The information should autofill to the account being used. Double-check that the name and email are correct.



Community Partner Organization

- Selecting one of the blue boxes will open a pop-up window with a list of all previous community partner organizations. Use the search box to find your community partner, or add a community partner organization if it doesn't appear.
- After selecting an organization, options for the specific opportunity will appear. Select one of the existing opportunities, or create a new one.
 - Selecting an existing opportunity will autofill the description, location, category, dates, etc.
 - Creating a new opportunity will require filling in the description, location, category, dates, etc.
- All community partner organizations and existing opportunities link directly to the "Browse Civic Engagement Opportunities" icon under the "Participant Home" tab on the left side of the dashboard. Selecting an existing opportunity will autofill with information submitted by the community partner organization when they created a new opportunity under this tab.



Creating a New Opportunity

- ✓ All of the following headings will be autofilled if an existing opportunity is selected. However, not all opportunities are advertised or available to the wider OSU student body. For unique volunteer opportunities, please select "New Opportunity" and fill [New Opportunity](#) in the following information.

Description

- When creating a new opportunity, a text box will appear to fill in a description of the opportunity.

Description*
Please provide a brief description of this civic engagement opportunity, event, or need including any information you feel may be useful for someone considering this civic engagement opportunity.

Location

- Fill in the location, if applicable. Most volunteer projects will have at least a general location to provide.

Location
If there is a location for this civic engagement opportunity, then please list the location and provide a street address and/or building name/number.

No Specific Location
 Specific Address [?](#)
 County [?](#)
 Text Only [?](#)

Categories

- Select which categories the new opportunity best fits in to. Most volunteer activity falls into the "Direct Service" category.

Categories*
What type of civic engagement opportunity is this? (Select all that apply)

Activism and Advocacy [?](#)
 Direct Service [?](#)
 Event/Meeting [?](#)
 Philanthropy and Giving [?](#)

Engagement/Issue Areas

- Select which topics the new opportunity addresses. The most frequently used topic for CoF Clubs is “Environment”, but feel free to include others as applicable.

Engagement/Issue Areas*
What issue areas does this opportunity primarily address? (Select all that apply)

- Animal Welfare
- Arts and Culture
- Bilingual
- Children and Youth Development
- Criminal Justice
- Cultural Sharing and Education
- Disaster Preparedness and Relief
- Diverse Abilities
- Domestic Violence and Sexual Assault
- Economic Justice
- Education and Literacy
- Emergency Response and Public Safety
- Environment
- Gender Issues
- Health and Well Being
- Housing and Homelessness
- Hunger and Food Insecurity
- Immigration
- Land Use and Planning
- LGBTQ+
- Racial Justice
- Seniors
- Veterans

Volunteer Supervisor

- Click “Select a Person”. A new window will appear.
- Use the search bar to find the volunteer supervisor, or click “+ Add New Person” at the bottom of the window if the volunteer supervisor isn’t already in the system.

Volunteer Supervisor*
Who supervised volunteers for this civic engagement opportunity?

[Select a Person](#)

Civic Engagement Date

- Enter the volunteer date.

Civic Engagement Date*
When did your civic engagement activity take place?

Date: Multiple Days

Impact

- Enter the number of people directly impacted by the volunteer project (a rough estimate is fine).
- Use the following text box to describe how the wider community was impacted by the volunteer project.
- Use the last text box to describe how the volunteer project impacted you personally, especially if you had a leadership role.

People Impacted
How many people were impacted by your civic engagement activity?

Community Impact
How was the community impacted by your engagement?

Personal Impact
What did you gain or how were you impacted by your civic engagement activity?

County

- Click “Oregon” below the header and select the appropriate county from the popup window.
- This is used to track the distribution and reach of OSU student organization activities.

County*
In which county did the service take place?

[Oregon](#) [All States](#)

Civic Engagement Time

- There are two options for recording the amount of time spent on the volunteer project:
 - Everyone contributed equally, or
 - Some people contributed more time than others
- For pre-arranged volunteer projects that the club simply participates in (i.e. does not sponsor, host, or plan), select the first option.
 - Enter the number of hours spent on the project, and select the people who were involved.
- For volunteer projects that require club leadership (i.e. some members/officers spend more time planning the project while others simply participate), select the second option.
 - Enter the number of hours next to each name. Only those people formally recognized as members/officers on SLI will appear.

EMAIL

- ✓ The email function can be used to send messages through the SLI database to all or specific club members.
- ✓ Recipient selection can be based on membership, participation/registration in club activities, or manual selection.
- ✓ The SLI database generates an automatic email format that can be edited to include your specific message.
- ✓ This email system is used to send automatic reminders about meetings if the option to do so is selected (see page 8 for more information).



PRINT

- ✓ The SLI database is capable of generating a number of reports, including membership, activities, and sponsorship status.
- ✓ The reports can be printed or emailed from this page.



REPORTING

- ✓ The SLI database is capable of generating a number of reports and includes the option of creating a custom data query.
- ✓ Reports can be formatted as charts and graphs, spreadsheets, or printed reports.
- ✓ This function can be useful for:
 - Tracking annual membership
 - Tracking officer positions
 - Tracking the level of club activity annually
 - Tracking annual, term-based, or activity budgets
 - Tracking annual budget balances
- ✓ Talk to the Clubs Liaison for more information about the reporting section (it is useful for the annual reports and not much else, and therefore is not a high priority in this manual).



CALENDAR

- ✓ The calendar provides a way to view all recorded club activities and meetings in a single location.
- ✓ Meetings and activities cannot be edited from the calendar – dates and times must be edited in the activity report or in the meeting record.
- ✓ The calendar presented here is the same one that appears on the [SLI club database](#), where people can search for new organizations to join.



FINAL WORDS

Congratulations! You made it to the end and are now an expert on the Student Leadership & Involvement database processes. Hopefully this guidebook has provided some assistance towards completing the University, College, and Club requirements.

Please contact the Clubs Liaison at cofstudentclubs@oregonstate.edu with any questions or suggestions about the manual.

Go Beavs!