



**THE OHIO STATE UNIVERSITY**

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# Reporting 101

September 5, 2019

Tyler Gagai – Regional Engagement Officer- Northern &  
Southeastern Ohio

Jason Homan – Regional Engagement Officer, Southeast US  
The Ohio State University Alumni Association



# Agenda

- Why Report?
- Reimbursement guidelines
- Submitting Post Event Forms
- Membership and Board Rosters
- Sharing of Best Practices
- Q&A



## Why do we need to report?

- We want to celebrate YOU!
- We use this information to share with university leadership – to advocate for resources for alumni groups – like Symposium, speakers lists, communication services, monetary support, staff support, etc.
- This information can be used in crafting your applications for awards at the end of the fiscal year!



## What can be reimbursed?

- Consult with your OSUAA staff representative prior to submitting
- Event supplies for Category 1 Events
  - Up to \$250 and up to \$500 for Networking
  - \$500 for qualified Sesquicentennial events in the Special Events category
- Board Meetings
  - Up to \$50 for 10 meetings in a fiscal year, for Gray and Scarlet clubs



<b>CATEGORY 1 EVENTS</b>	<b>REIMBURSEMENT AMOUNT</b>
Community service	Up to \$250
Student programming	Up to \$250
Networking*	Up to \$500
Special interest	Up to \$250
Arts	Up to \$250
Lifelong learning	Up to \$250
Diversity	Up to \$250
Wellness	Up to \$250



### ALUMNI CLUB INCENTIVE GRID

	CARMEN	GRAY	SCARLET
<b>EVENTS</b> Minimum requirements	<ul style="list-style-type: none"> <li>• Game day</li> <li>• Minimum 2 board meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Game day</li> <li>• Minimum 2 board meetings</li> <li>• 3 category I events</li> <li>• Scholarship fundraiser</li> </ul>	<ul style="list-style-type: none"> <li>• Game day</li> <li>• Minimum 2 board meetings</li> <li>• 5 category I events</li> <li>• Scholarship fundraiser</li> </ul>
<b>INCENTIVE</b> At the start of each fiscal year, incentive deposited in current use funds or disbursed on when tier is reached	–	\$1,000	\$2,000

### ALUMNI SOCIETY INCENTIVE GRID

	CARMEN	GRAY	SCARLET
<b>EVENTS</b> Minimum requirements	<ul style="list-style-type: none"> <li>• Minimum 2 board meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Minimum 2 board meetings</li> <li>• 3 category I events</li> <li>• Unlimited category II events</li> <li>• Scholarship fundraiser</li> </ul>	<ul style="list-style-type: none"> <li>• Minimum 2 board meetings</li> <li>• 5 category I events</li> <li>• Unlimited category II events</li> <li>• Scholarship fundraiser</li> </ul>
<b>INCENTIVE</b> At the start of each fiscal year, incentive deposited in current use funds or disbursed on when tier is reached	–	\$1,000	\$2,000



## Post Event Forms

- Docusign
- Submitter and two signers
- Supplemental materials
  - Attendance sheet
  - Receipts, if seeking reimbursement
  - Optional: pictures of event and other materials
- Submit within **30 days** after the event







## **Submitting your materials**

Steps to submit information:

1. Navigate to: [groups.alumni.osu.edu](http://groups.alumni.osu.edu)
2. Click on the “Reporting” tab
3. Two columns – for Clubs and for Societies – select from your appropriate side

To *receive reimbursement*

- Click the form that says Seeking Reimbursement
- Be sure to have two different signers than yourself signing this form
- Reimbursements will be in your account 2 weeks after you submit

To submit event information *not seeking reimbursement*

- Click and fill out the form that says Not Seeking Reimbursement
- You won't need additional signers for this form



## PowerForm Signer Information

If there are other 'roles' required for this document to be completed, please enter the name and email of these other recipients. An email will be sent inviting them to sign along with you.

Please enter your name and email to begin the signing process.

Your Role:

**Initiator** \*

Your Name:

Brutus Buckeye

Your Email:

buckeye.1870@osu.edu

Please provide information for any other signers needed for this document.

Role:

**Board Member 1** \*

Name:

Carmen Ohio

Email:

ohio.1802@osu.edu

Role:

**Board Member 2** \*

Name:

Scarlet Gray

Email:

gray.1878@osu.edu

Begin Signing

Once you click on the reimbursement link, here's what will appear.

Fill in your info, along with the name and email for two additional board members, then click the red "Begin Signing" button.



## Please Review & Act on These Documents



The Ohio State University Alumni Association Clubs & Societies REO  
The Ohio State University Alumni Association



Powered by **DocuSign**

Please review & sign your document. To begin the process of reviewing and signing your documents, please click the button below. Signing will not be complete until you have reviewed the agreement and you have confirmed your signature.


Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

**CONTINUE**    FINISH LATER    OTHER ACTIONS ▾

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DocuSign Envelope ID: 5C8561A5-BC84-43BB-A49D-FF8D89C73A39



**THE OHIO STATE UNIVERSITY**  
ALUMNI ASSOCIATION

Club & Society Post Event & Reimbursement Form

Please fill this form out in its entirety. Board member approval for reimbursement must come from two board members to be reimbursed and must not be related. This form must be submitted no later than 30 days post-event to be considered for reimbursement.

Name of person submitting report:

Email of person submitting report:

Phone of person submitting report:

Name of Club/Society:

Event Name:

Event Date:

Event Time:

Category | Event Type:  Arts     Community Service     Diversity     Lifelong Learning  
 Board Meeting     Health/Wellness     Networking     Special Interest     Student Engagement

Number of Attendees:     Reimbursement Amount:

Do you have Receipts, Attendance Sheets, Minutes or Agenda to attach?  Yes  No



DocuSign Envelope ID: 5C8561A5-BC84-43BB-A49D-FF8D89C73A39



## THE OHIO STATE UNIVERSITY ALUMNI ASSOCIATION

### Club & Society Post Event & Reimbursement Form

Please fill this form out in its entirety. Board member approval for reimbursement must come from two board members to be reimbursed and must not be related. This form must be submitted no later than 30 days post-event to be considered for reimbursement.

**NEXT**

Name of person submitting report: Bruce Buckeye

Email of person submitting report: buckeye.1870@osu.edu

Phone of person submitting report: 623-456-7890

Name of Club/Society: Legends of Ohio State Alumni Society

Event Name: Alumni Networking Night

Event Date: 8/7/19

Event Time: 5:30-7:30pm

Category / Event Type:  Arts  Community Service  Diversity  Lifelong Learning  
 Board Meeting  Health/Wellness  Networking  Special Interest  Student Engagement

Number of Attendees: 51 Reimbursement Amount: \$500.00

Do you have Receipts, Attendance Sheets, Minutes or Agenda to attach?  Yes  No



Description of Event (Please include details of expenses):

This was networking event we hosted for alumni in in Central Ohio at The Wine Bistro in Columbus. We handed out Buckeye Bingo Sheets to all attendees to help facilitate networking, and we also encouraged attendees to bring their business cards through the marketing of the event. We promoted the event on our Facebook page, our society email listserve, and through the Alumni Association's email service. Expenses included appetizers, and one drink ticket and gratuity.

#### Board Member Approval

Board Member 1 Name: Carmen Ohio

Board Member 1 Email: ohio.1802@osu.edu

Board Member 2 Name: Scarlet Gray

Board Member 2 Email: gray.1878@osu.edu



Club and Society Reimbursement Form.pdf


2 of 2

**FINISH**



**Save a Copy of Your Document**

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**Your document has been signed**

If you would like a copy for your records, select Download or Print and save.

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**DOWNLOAD**      PRINT      CLOSE



## **Board members signing- reimbursements**

- Signers will receive an email from DocuSign
- Signers will go through a similar process of looking through the document and signing electronically
- Once both have signed, the initiator will receive an email confirmation with the document attached for your records



Reply Reply All Forward IM



Wed 8/14/2019 9:20 AM

DocuSign System <dse\_na2@docusign.net>

Please sign Club and Society Reimbursement Form for **Submitter's name displays here**

To: [Email address appears here](#)

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)



## THE OHIO STATE UNIVERSITY

ALUMNI ASSOCIATION



The Ohio State University Alumni Association Clubs & Societies REO sent you a document to review and sign.

[REVIEW DOCUMENT](#)

The Ohio State University Alumni Association Clubs & Societies REO  
[reo@osu.edu](mailto:reo@osu.edu)

Please review & sign your document. To begin the process of reviewing and signing your documents, please click the button below. Signing will not be complete until you have reviewed the agreement and you have confirmed your signature.

Powered by **DocuSign**

#### Do Not Share This Email

This email contains a secure link to DocuSign. Please do not share this email, link, or access code with others.





**Board Member Approval**

Board Member 1 Name: Board member name displays here

Board Member 1 Email: Board member email displays here

Board Member 2 Name: Board member name displays here

Board Member 2 Email: Board member email displays here

Required - Signature Applied

DocuSigned by:  
Board member signature displays here  
0707D04997634FE...



Completed: Please sign Club and Society Reimbursement Form for **Submitter's name displays here**

The Ohio State University Alumni Association Clubs & Societies REO via DocuSign <dse\_na2@docusign.net>  
to me ▾



**THE OHIO STATE UNIVERSITY**  
ALUMNI ASSOCIATION



Your document has been completed

**VIEW COMPLETED DOCUMENT**

The Ohio State University Alumni Association Clubs & Societies REO  
[reo@osu.edu](mailto:reo@osu.edu)

All parties have completed Please sign Club and Society Reimbursement Form for Jason Homan.

Please review & sign your document. To begin the process of reviewing and signing your documents, please click the button below. Signing will not be complete until you have reviewed the agreement and you have confirmed your signature.

Powered by **DocuSign**



# Questions?



## Annual Reporting

Submit both items to your OSUAA staff


- Board roster
- Membership roster

Templates can be found on the Alumni Groups Website

- Navigate to [groups.alumni.osu.edu](http://groups.alumni.osu.edu)
- Click on the “Reporting” tab
- Find the templates under the appropriate column, Clubs or Societies





	A	C	D	E	F	G	H	I	J	K	L
1			<b>Society Name:</b>		<b>Date of Submission:</b>						
2											
3	<b>First Name</b>	<b>Last Name</b>	<b>Phone</b>	<b>Email</b>	<b>Street Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Graduation Year</b>	<b>Notes</b>	<b>Member Expiration Date</b>
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## (Free) Tools to make reporting easier

- Google Drive
  - Google Sheets
  - Google Docs
  - Great for groups already using a Gmail address



# Google Drive

Google Drive

Meet Drive Using Drive

## A safe place for all your files

### Personal

Store, share, and access your files from any device. Your first 15 GB of storage are free.

[Go to Google Drive](#)

### Business

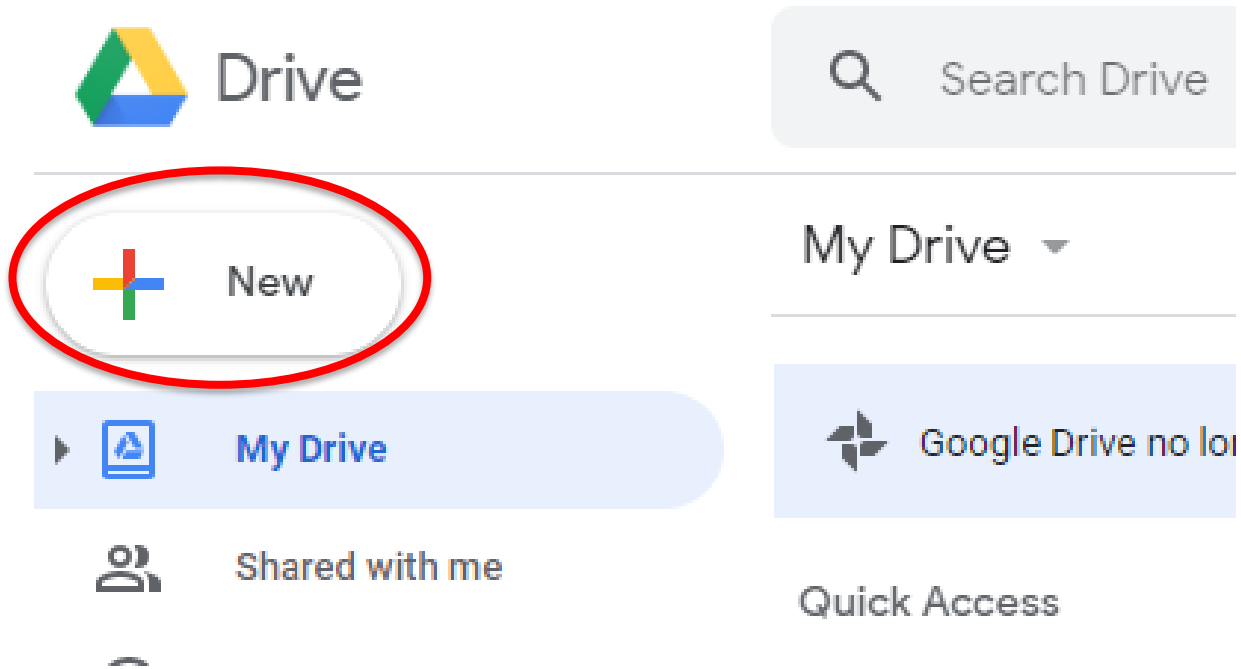
With Drive Enterprise, businesses only pay for the storage employees use. It comes with Google Docs, Sheets, and Slides — and works seamlessly with Microsoft Office.

[Learn more](#)



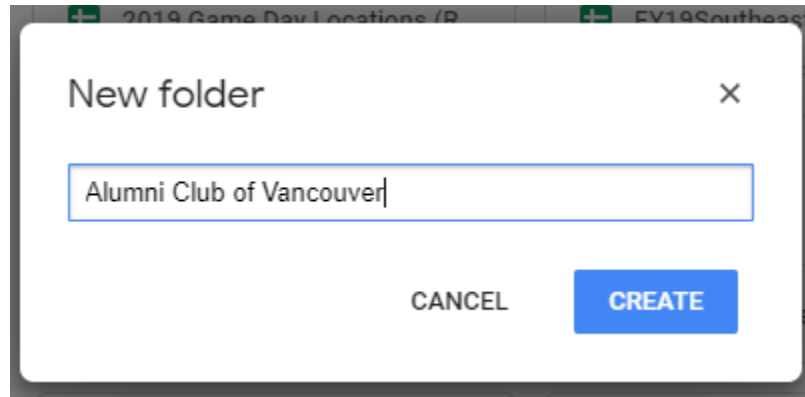


# Google Drive





# Google Drive



My Drive ▾ 🔍 👤 🗑️ ⋮ 📄


🔗 Google Drive no longer syncs with Google Photos. Your photos are safe in Google Photos. [Learn more](#)

Quick Access


Name ↑	Owner	Last modified by me	File size
📁 Alumni Club	me	Nov 11, 2017	–
📁 Alumni Club of Vancouver	me	1:39 PM	–
📁 Ambassadors	me	Aug 13, 2017	–



# Google Drive

Share with others Get shareable link 

People



[Done](#) Advanced



## Best Practices of Reporting

- Look at your calendar of events at the beginning of the year and mark the times you'll need to submit. Share with your OSUAA staff contact so they're aware too!
- Assign 1-2 people to this task for the year
  - Know your two signers emails & follow up with them once you hit submit
- Complete forms within 30 days of event
- Save the PDFs to your personal devices
- When in doubt, ask your OSUAA staff contact for help!



# Around the Room



# Q & A



# Thank you

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614-688-1080

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