

Orientation for Registered Campus Organizations

2013-2014

Office of Student Life
<http://osl.sa.ucsb.edu>

Presented By:

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What is the Office of Student Life?

OSL contributes to the “**comprehensive liberal arts learning experience**” by promoting “**intellectual and personal development**” and a “**sense of community**” through initiatives designed to **engage the student body in co-curricular activities.**

In addition to several special projects, OSL is home to three units:

1. Campus Orgs
2. Leadership Development
3. Fraternity & Sorority (“Greek”) Life

Sources: UCSB Mission Statement, Student Affairs Mission Statement

Our Website

Office of Student Life:

<http://osl.sa.ucsb.edu> – or simply, osl.sa.ucsb.edu

Campus Orgs with websites built in OrgSync:

[http://osl.sa.ucsb.edu/org/\[yourorg\]](http://osl.sa.ucsb.edu/org/[yourorg])



Visit our website to review steps to register and to access OrgSync. To access OrgSync in order to manage your organization and involvement, click "Access OrgSync" in the upper-right corner.

E-Mailing the OSL Activities Advisors

Use a single E-mail address to contact all of the OSL Activities Advisors. This ensures that you will receive a timely response. The team includes:

Katya Armistead

Miles Ashlock

Wendy Córdova

Viviana Marsano

Danielle Quiñones

CampusOrgs@sa.ucsb.edu

Priority Registration Requirements

1. Create or Update Org's OrgSync profile
 1. Upload New or Approve Existing Constitution
 2. Update organization officers/advisor contact information
 3. Download 2013-2014 Signatory Form and submit to OSL
2. Pay \$25 Registration Fee to OSL
 1. Fee increases to \$40 after **October 5**
3. Attend Required Workshops: Orientation (this workshop) and Student Leader Retreat

Complete these requirements by **October 4, 2013**

Fall 2013 Priority Registration Workshop Schedule

At least one representative per org must attend each event:

* **Campus Orgs Orientation** (attend one) **YOU ARE HERE**

* **Student Leader Retreat**

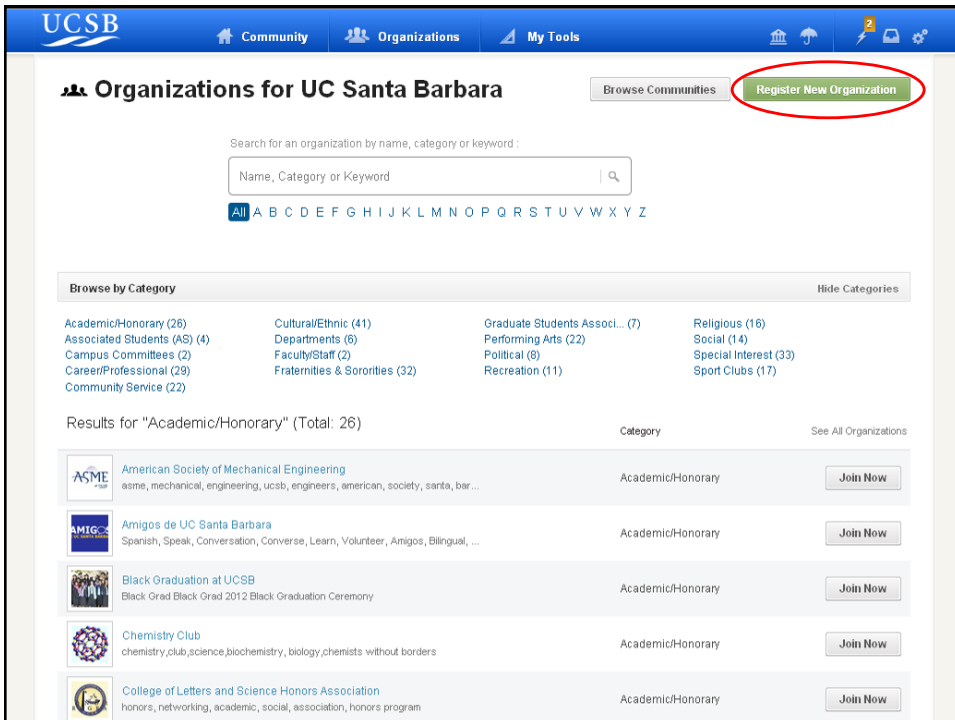
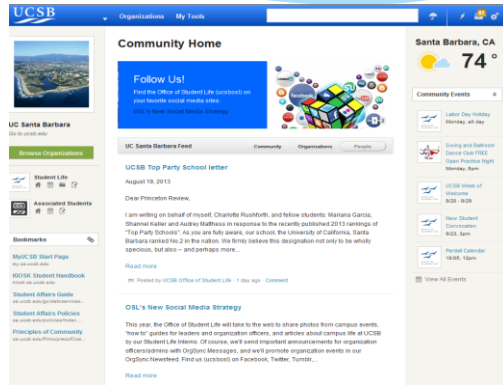
Saturday, September 28th, 8am-3pm

*There will be a Campus Orgs Orientation 3-4:30pm immediately following the retreat.

Register: <http://leadership.sa.ucsb.edu/retreat/>

What is Orgsync?

- * The organization management system for UC Santa Barbara
- * Visit our website to access OrgSync. Click "Access OrgSync" in the upper-right corner.



UCSB Community Organizations My Tools

Graduate Students Association - Education

[Invite Members](#)

Welcome Feed Profile

The Graduate Students Association in Education (GSAE) is the official graduate student association, which exists to promote and represent the interests of graduate students in the Gevirtz Graduate School of Education--CCSP, ED, and TEP--to the UCSB campus community on administrative, academic, and student affairs.

The GSAE meets regularly. Every graduate student in the Gevirtz Graduate School of Education is invited to participate in the monthly association meetings, which are presently held on the **first Friday of each month at noon** in the "New Blue Room" lounge, Education 3134.

- Member Rosters and Communication Tools
- Organization calendar and event planner
- File storage and sharing (.docx, .ppt, .pdf, etc.)
- Online Forms design and collection
 - Including OSL forms!
- Photo and Video albums
- Shared To-Do Lists
- Public Web Site Builder

Upcoming Events [See All](#)

GGSE Caffeine Co-op
Tomorrow, 3pm

GOSE Balcony Bash!
Thursday, 5pm

GSAE Meeting (Execs)
Friday, 12pm

GSA General Body Meeting
11/01, 8pm

GSAE Meeting (Open)
11/04, 12pm

Bookmarks [See All](#)

No bookmarks have been added yet.

[Add a Bookmark](#)

GSAE

- People
- Communication
- Calendar
- Events
- Files
- Forms
- Bookmarks
- Photos
- To-do Lists
- Videos
- Website
- Settings

Campus Orgs Trustee Accounts

ACCOUNTING – You have 2 accounts!

OSL Trustee Account

- * Make **deposits** at the AS Ticket Office/Cashier Window.
- * Make **withdrawals** (requisitions/cash advances) on OrgSync through OSL.
- * Spend this money on virtually anything **except** alcohol. Requires documentation (receipts, contract, approvals, etc.)
- * Unused funds roll over.

Campus Orgs Accountant:
Coleen.Sears@sa.ucsb.edu

AS Funding Account

- * No deposits. Funding is **allocated** from AS BCCs.
- * Make **withdrawals** (requisitions) through AS.
- * Money can be spent **only** on items pre-approved by the funding AS BCC that year. Requires documentation.
- * Note: AS Finance Board provides \$250 start-up fund for continuing orgs. Request online!

Accepting Check Deposits

Starting immediately, please ask that checks written out to your organization be made payable to:

“UCSB Office of Student Life”

Or

“UCSB Office of Student Life *Your Org Name*”

Your organization name should **always** be indicated in the memo line of the check.

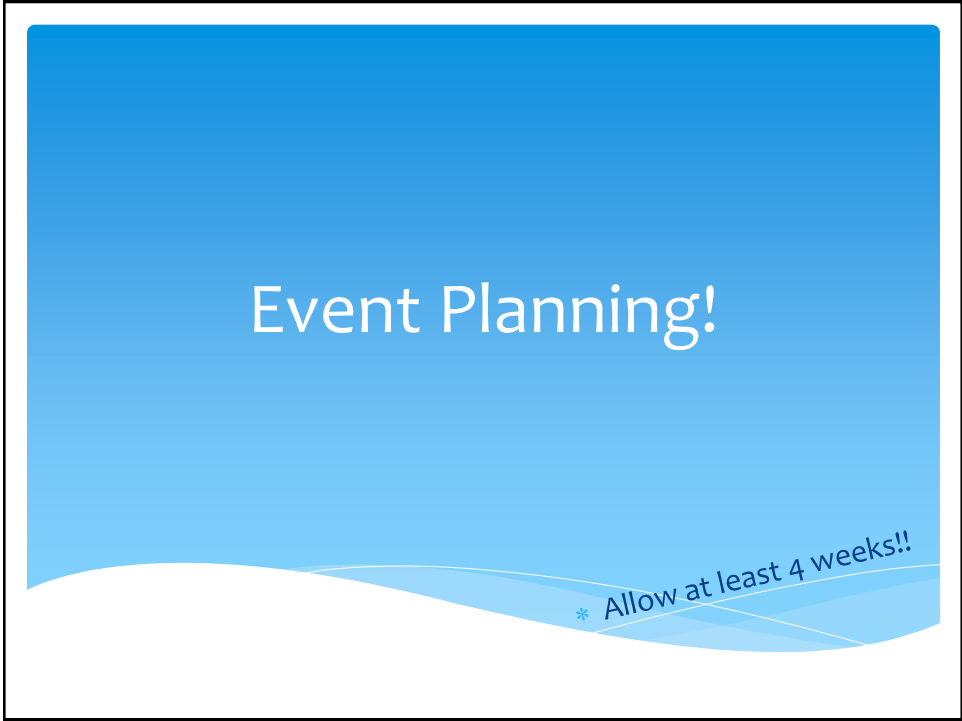
A Note About Overdrawn Accounts

If a campus organization's Trustee Account balance remains in deficit, per *Campus Regulations*, organization officers are responsible for repaying the account. Under this policy the Office of Student Life will take the following steps to clear a deficit balance:

- a. The Accountant will notify, via email, the organization's officers that their account has a deficit balance and the amount owed. The account will be frozen. No further transactions or room reservation will be processed for the group, and existing room reservations and media services may be canceled. The officers will have one month (30 calendar days) to deposit funds into the account to cover the deficit.
- d. If, after 30 days from the email notification, a deposit has not been made to cover the deficit account balance, the Accountant will bill the individual officer's BARC accounts in equal amounts to cover the deficit.
- e. If, after 30 days from billing the officer's BARC accounts, the deficit is still outstanding, the Office of Student Life will place a block against the student's registration for the following quarter. The block will be removed once the deficit is cleared.

Taxes – For Organizations, Too

- * Registered campus organizations, like all individuals and organizations, are required to file—and in some instances, pay—taxes.
- * Generally, organizations who accept less than \$5,000 of deposits (dues, fees, fundraisers, donations, etc.) in a year need not file with the IRS and are exempt from tax.
- * However, organizations who accept \$5,000 or more of deposits do need to file with the IRS and may be liable for tax.
- * If your organization accepts more than \$5,000 of deposits annually, you are responsible for filing appropriate tax forms and we recommend that you discuss your tax situation with a qualified tax advisor.



Event Planning

- ✓ Advising
- ✓ Logistics
- ✓ Risk Management

Fill Out This Form

360° EVENT PLANNING GUIDE Back

Pages

- Event Hosts
- Event Date & Facilities
- Event Purpose, Impact & Logistics
- Event Logistics, continued
- Event Multimedia
- Campus Resources
- Risk Management
- Approval & Digital Signature

Event Hosts

Please complete this form thoroughly to ensure timely approval of your event.

Organization Name *

Affiliated Organizations

Is this event hosted or affiliated with any other organizations (including campus departments or local, national or international organizations)?

Event Representative #1 - Name & Title *

Who should campus officials contact with questions about this event?
E.g: Gary Gaucho, President

Event Representative #1 - Phone Number *

Format: 555-893-4569

Format: 555-555-5555

When is a 360 Required?

- * Request for funding from a campus entity
- * Reservation of major venues
- * Meetings beyond general membership meetings or small routine events (e.g. workshops, tabling, food sales, small special events, and other smaller self-funded events)
- * The 360 Event Planning Guide presents an interactive checklist to make sure that organizers make essential considerations and ask critical questions for a risk-reduced, successful event
- * Top Risks: Capacity/Facility, Financial, Physical, Security/Safety

360° Event Planning

- * **Event Hosts**
 - * Orgs, Event Representatives, Contact Info
- * **Event Date & Facilities**
 - * Title, Type, Attendance
 - * General Assignment Reservation Form (if applicable)
 - * Admission Fee
 - * Restroom Availability



360° Event Planning

- * **Event Purpose, Impact & Logistics**
 - * Event Goals, Agenda, Budget
 - * Staffing
 - * Contribution to Organization
 - * Marketing & Advertising Plan
 - * Performance Agreements & Contracts
 - * Food/Sales Permits (Form on Orgsync) ; Alcohol Availability
 - * Amplified Sound Permits
 - * Dead Week Exceptions
 - * Inclement Weather Plans



360° Event Planning

- * **Event Multimedia**
 - * Audio, Video, & Computing Request Form
 - * Special Requests & Campus Electrician
- * **Campus Resources**
 - * Catering Guidelines
 - * Event Ticketing (A. S.)
 - * Furniture Services
 - * Travel/Transportation & Parking Services
 - * ADA Accommodations
 - * Fire Marshal Consultation



360° Event Planning

- * **Risk Management**

- * University Waivers (Elective/Facilities)
- * Event Insurance
- * Audits: Physical, Emotional, Facility, Reputation, & Finance Risks

- * **Approval & Digital Signature**

- * Questions or comments for the OSL Activities Advisors

Minor Events

- * No reservation required
- * Every Wednesday 12pm-1pm weeks 1-9 (FWS)
- * Automatically instructed to attend after completing 360
- * Average of 5-6 activities per meeting (range is 2-15)
- * Special meetings for recurring annual campaigns (e.g. culture weeks) that are part of our campus culture

- * **Committee Members**

- * Activities Advisors
- * Associate Dean/Director
- * Campus Events Scheduler
- * Campus Police
- * CSO (Public Safety)
- * Fire Marshal
- * Hall/Venue Staff
- * Media Services Staff
- * Ticket Seller (AS)
- * Transportation & Parking Services

The Minor Events Agenda

- * Service Provider and Student Organizer Introductions
- * Event Overviews & Analyses
 - * Providers have already reviewed 360 Event Planning Guide
 - * Review and clarify salient issues on 360
 - * Providers give advice, estimates, and direction
 - * Key considerations: audio/visual needs, contacts, contingency plans, CSO scheduling, event agenda (pre-meeting, doors, tickets), financing, guest composition, insurance, occupancy, parking permits and signage, police scheduling, private security, signage, ticket sales, volunteer recruitment and training, waivers
- * Committee Review and Debrief

Proof of Funding Required!

- * 5 days before the event you will be required to provide proof of secured funding for the event.
- * Can be done via E-mail or copies turned into OSL front desk to Attn: Activities.
- * If the OSL Activities Advisors do not receive funding confirmation for your event, it may be cancelled!

When the Event is Over... It's Not

- * Don't forget to **Evaluate** the success of your event and leave notes for next year's officers.
- * And, remember, it's time to **pay the bills!**

Funding

Associated Students

- * **Finance Board** <http://www.as.ucsb.edu/financeboard/>
- * **Boards, Committees, and Commissions (BCCs)**
<http://www.as.ucsb.edu/get-involved/current-organizations/>

Office of Student Life

- * **After Dark** <http://www.sa.ucsb.edu/osl/latenite/>
- * **CommUnity Grants**
<http://osl.sa.ucsb.edu/CommUnity/>
- * **Student-Initiated Outreach Programming (SIOP)**
www.sa.ucsb.edu/siop/

After Dark Funding

- * Allocates funds for student-initiated, alcohol-free social events and activities which serve as alternatives to the Isla Vista party scene.
- * Supports social, recreational or entertainment-based programs on Thursday, Friday, or Saturday late nights (after 8:00pm).
- * Events must be held in a public venue, on campus, or in Isla Vista.
- * Alcohol free or non-alcohol-centered.

E-mail the Intern: MacPherson.Intern@sa.ucsb.edu
www.sa.ucsb.edu/osl/LateNite

FREE EVENT MARKETING: Gaucho Nights Calendar

- Sponsored by UCSB After Dark
- Two avenues where you can get free marketing
 - Facebook: highlights a couple of top picks each day ([facebook.com/gauchonights](https://www.facebook.com/gauchonights))
 - Calendar: has dozens of events each day, color-coded by event type (localendar.com/public/gaucho)
- It's easy to submit an event!
 - Go onto Org Sync at <https://orgsync.com/35816/forms/84087>
 - Upload an event picture
- If 50% of your organization likes us on Facebook, we will give you top priority for After Dark funding!!



UCSB Gaucho Nights
August 1st

8/1 SOMETHING TO DO WITH THE FAMILY:
Ever wanted to set a paper lantern in the sky? Now's your chance to make a lantern. Come enjoy 8/1 Thursday and construct your very own paper lantern under the guidance of helpful museum artists. Bring L... See More



CommUnity Grants Funding

- * CommUnity Grants are designed to promote campus discourse around issues related to identity and cross-cultural interaction, as well as to enhance collaboration between diverse student organizations in order to build understanding and unity.
- * Must be collaboration between at least 2 registered orgs and open to the community and held in public venue on campus or in IV.
- * Maximum grant is \$500 per quarter per organization.
- * Fill out the **CommUnity Grants Application** in your organization's OrgSync portal.

SIOF Funding

- * Funds projects that are designed to increase the eligibility and college attendance rates of underrepresented, low-income, and other specifically identified disadvantaged populations.
- * Interested organizations must attend the mandatory SIOF Orientation on **Thursday, October 17, 2013 3:00pm - 5:30pm** in the SRB Multipurpose Room.
- * Applications are due by **Friday, December 6, 2013**.
- * Proposed program must be fully developed at time of application.

E-mail the SIOF Chair: Ortiz-B@sa.ucsb.edu
www.sa.ucsb.edu/siof/

Other Sources

- * **University Center (UCen)**
<http://ucen.ucsb.edu/hub/> - Click "Funding Request"
- * Campus Departments
- * Local Businesses & Organizations
- * Private Donors

Use of a Tax ID for Donations

- * Registered campus organizations are not eligible to use the campus' Tax ID. Providing the Tax ID without prior approval puts your organization and your donor at risk.
- * There are three solutions to the "Tax ID" question:
 1. Your organization can become a tax-exempt/non-profit organization by filing necessary documents with the IRS.
 2. The OSL Activities Advisors can provide a statement to your donor that indicates your not-for-profit model and affiliation with UCSB. (Most popular)
 3. For larger donations (\$1,000+), the OSL Activities Advisors can work with you to prepare a contractual agreement between your donor and the University. This formal accounting mechanism will make your gift tax-deductible to the donor.

Reserving Common Spaces in the SRB

- * Like in Spring 2013, student groups interested in reserving common spaces in the SRB will enter into a lottery. Requirements:
 - * Must be a OSL-registered organization, or AS or GSA-affiliated organization
 - * Select 1 person to serve as group representative
 - * Group representative can draw a lottery number between 8am and 8:30am on the morning of Thursday, September 26, 2013. The lottery number designates your place in line.
 - * The information desk will begin reserving spaces with the group that drew the lowest number.
 - * Student groups can reserve a max of 3 events in the MPR and 1 recurring event in the building
- * This lottery processes does not allow groups to reserve the Cultural Resource Centers or conference rooms that are controlled by depts.
 - * To reserve CRC, see EOP office

Campus Regulations

- * Covers rights and responsibilities of general student body and campus organizations. When in doubt – check them out!
www.sa.ucsb.edu/Regulations/
- * Organizations and their Officers can face judicial sanctions if they do not comply with Campus Regulations.
- * The RCO Conduct Board has been reestablished to adjudicate infractions against the Campus Regulations and other policies.
 - * The board is currently filled.

Creating Your Org Website

- * Using the Website Builder in OrgSync, you can create a professional and dynamic website for your organization!
 - * Your site will have the address/URL [http://osl.sa.ucsb.edu/org/\[custom_name\]/](http://osl.sa.ucsb.edu/org/[custom_name]/).
 - * Your org can also purchase a URL (e.g. www.clubatucsb.org) and redirect it to your website on OrgSync.
- * You can get started with an OrgSync website *today!*
- * Stay tuned for workshops offered by our office!

Final Words