

Orientation for Registered Campus Organizations

2016-17

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



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 + Peer Mentors

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

Katya Armistead	Miles Ashlock	Wendy Córdova
Sophie Friedman	Danielle Quiñones Ortega	
Viviana Marsano	11 OSL Peer Advisors	

CampusOrgs@sa.ucsb.edu

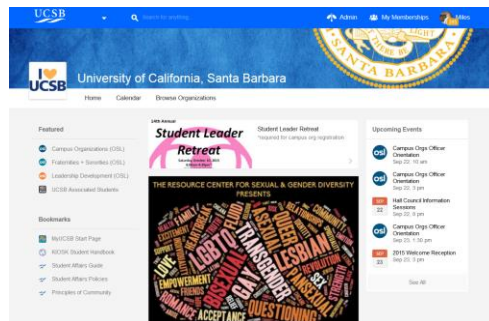
Registration Requirements

1. Create or Update Org's OrgSync profile
 1. Upload New or Approve Existing Constitution
 2. Update organization officers/advisor contact information
2. Have all Officers formally accept the position
3. Pay \$40 Registration Fee to OSL (now automatic) or \$25 if you attend the Student Leader Retreat
4. Attend Required Workshops: Orientation (this workshop) and Student Leader Retreat (October 1st)

See <http://osl.sa.ucsb.edu>

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.



Organizations

The screenshot shows the UCSB OrgSync portal interface. At the top, there is a blue header with the UCSB logo and a search bar. Below the header, there is a navigation bar with tabs for Home, Calendar, and Browse Organizations. A search bar is present with the text 'Search by name or keyword'. To the right of the search bar, there are dropdown menus for 'All Umbrellas' and 'All Categories'. A red circle highlights a button labeled 'Register New Organization'. Below the search bar, there is a keyboard layout for filtering by letter (A-Z) and an 'Other' option. The text 'Showing all 696 portals.' is visible at the bottom of the search area.

[Creating an OrgSync Portal Tutorial](#)

A Completed OrgSync Portal

* Has been approved by all listed officers (3 minimum + 1 advisor)

The screenshot displays a completed OrgSync portal for 'Leadership Development (OSL)'. The page has a yellow header with the OSL logo and the UCSB seal. Below the header, there is a navigation bar with tabs for Home, People, Events, Files, Forms, News, and More. A '204 Members' indicator and a 'Settings' link are also present. The main content area is divided into a 'Feed' and a 'Profile' section. The 'Profile' section features a welcome message: 'Welcome to Leadership Development!' followed by a brief description of the organization's mission. To the right, there is a 'Current Positions' section, which is circled in red. This section lists three officers: Miles W. Ashlock Burke (President/Chair), Danielle N Quiriones-Ortega (Vice President/Chair), and Coleen Sears (Treasurer). A 'See All' link is located below the list of officers.

[Approving Officer Certification From](#)

UCSB

Search for anything...

Admin My Memberships Miles

KEEP CALM AND ENJOY YOUR STUDENT LIFE

Campus Orgs Trustee Accounts

Student Life Student Staff

Home People Events Files Forms News More

23 Members Settings

Feed Profile

Write something...

Student Life Student Staff Evaluation (End of Year)

Forms

- Student Life Student Staff Evaluation (End of Year)
Last Active: June 23
- UCSB Student Life Student Staff Evaluation
Last Active: January 12

Top Files

- Kronos Timekeeping Quick Reference
- How to Clock In/Out of Multiple Available Jobs
- On-Campus Event

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

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

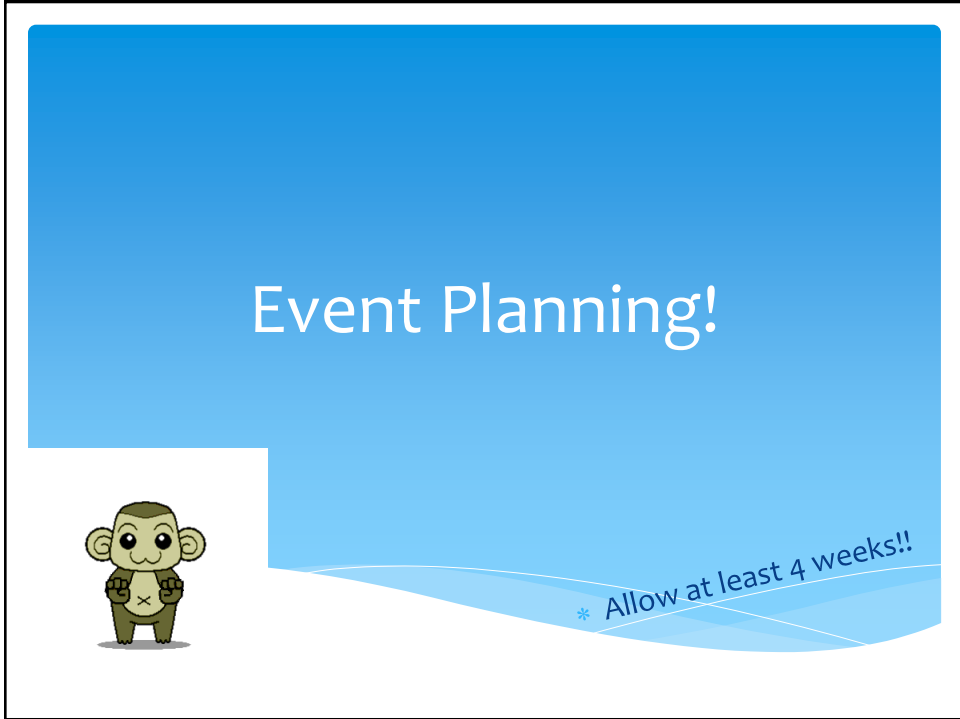
- * Registered campus organizations, like all individuals and organizations, are required to file—and in some instances, pay—taxes.
- * Generally, organizations who accept less than \$5,000 of deposits (dues, fees, fundraisers, donations, etc.) in a year need not file with the IRS and are exempt from 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.

Posting on Campus

- * Sandwich boards and/or plywood signs
 - * Cannot be located in bike loop round-about “islands”
 - * Signs must be self-supported and 5 feet from bike paths
 - * Signs must be removed within 48 hours of event
 - * No metal signs!!!
 - * Register signs via OrgSync
- * Bike Tunnels and Storke Plaza
 - * Post up to one 8ftx4ft butcher paper or vinyl posted on either side of the bike tunnels on campus and in Storke Plaza. You can also post up to two flyers in the tunnel. Only use blue painter tape. No staples.
- * Flyers on Kiosks
 - * Drop off 6 flyers (up to 11x17) at the OSL front desk to be posted on Kiosks.
 - * **All flyers/Posters must have the sponsoring campus organization/department listed!**

Tabling

- * Form located on OrgSync
- * Arbor area, in front of the University Center, Lot 22 (across from SRB – and must be reserved)
- * No amplification in Arbor ever
- * Tables and chairs available to borrow from OSL, EOP, & Women’s Center
- * Food Permits
- * No Money Transactions at the Arbor



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 *

Office of Student Life

Affiliated Organizations

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

YOUR ORGANIZATION!

Event Representative #1 - Name & Title *

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

Miles Ashlock, Associate Director

Event Representative #1 - Phone Number *

Format: 555-893-4569

805-893-3544

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

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

- * Make sure you leave the venue cleaner than you found it! We have gotten several complaints about the Lot 22 area and SRB BBQ area being left messy.
- * 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!**

A Note About Trash



Funding



Associated Students

- * **Finance and Business Committee**
<https://asfb.as.ucsb.edu/>
- * **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 us: campusorgs@sa.ucsb.edu
www.sa.ucsb.edu/osl/LateNite

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 **Saturday, October 1, 2016 10:30am or 1:45pm** during the Leadership Retreat.
- * Applications are due by **Friday, December 4, 2016**.
- * Proposed program must be fully developed at time of application.

E-mail the SIOF Co-Chairs: wendy.cordova@sa.ucsb.edu or viviana.marsano@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. 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

- * Student groups interested in reserving common spaces in the SRB will enter into a lottery on the first day of classes. 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 22, 2016. 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

Leadership Consultations

Did you know?

If your organization is facing a challenge, there is disagreement among officers, or you would like to provide development opportunities for officers and/or members, the Office of Student Life can help!

Use the Leadership Consultation Form on Orgsync to request assistance from a leadership consultant.

Leadership Awards!

- * Every year the Office of Student Life has awards for various programming efforts by campus organizations
 - * Most Creative Program
 - * President of the Year
 - * Organization of the Year

- * Submissions will open on Halloween!

Thank you!
Congratulations!

