

09/23/17 1st Onboarding Info Session

yale/extracurriculars/projectsource

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Deadlines:

- UOFC Grant Round 1: 27 September (for beginning of the year activities)
- UOFC Grant Round 2: 11 October
- UOFC Grant Round 3: 8 November

- UOFC Grant Round 4: 29 November

Overview of onboarding process

Benchmark meetings

- * oct: constitutions , roles, goals etc
- * dec,
- * march

Resources

- we get an SOConsultant who will email
- studentorgs.yalecollege.yale.edu
- YC Officers portal on Yale Connect

Use of Yale name

- merchandise: email Denise castellano
- use of disclaimer on websites: we are a student organization and our ideas don't represent Yale
- you can use the block Y and block YALE letters
- cannot alter Y logos or use athletic symbols
- Check out licensing.yale.edu/use-yale-name

Production resources/vendors

- up.yalecollege.yale.edu/production-resources/vendor-list
 - for stuff like bouncy castles

Event registration

- for > 50 people
- Do on YaleConnect

Insurance

- covered: there is a liability policy for registered organizations

Values and Goals

- Have your mission aligned with Yale's Mission (look it up) to make it easier to get grants and stuff

Yale Connect

orgsync vs Yale connect

- they are the same thing
- orgsync is branded as Yale connect
- registration and reregistration
- event management
- Community
 - Umbrellas: dean, student activities, residence life
 - Portals: math club, 4h club etc
 - users
- Permissions in orgsync are done using groups with permission levels
 - customize access to tools
 - events: reserve rooms on campus
 - message: message people in the group

the bare minimum

- register on orgsync every year
- keep admin roles updated
- but you don't have to use any other features

Join options

- you can configure if anyone can sign up or is it by invitation
- you can put people in a default group

Booking events/spaces

- Book on Orgsync through the events tab
- Use classrooms.yale.edu to see which classrooms are available, their pictures, filter by capacity and features etc.
- you can allow a limited number of rsvs
- you can add to the public + website/yale university calendars
- you can add preregistration form e.g. for asking people dietary options
- give at-least 3 days notice when booking

25live.collegenet.com/yale

- its a way to book rooms directly and not through Orgsync
- you can figure out who has the spaces you had wanted

Files tab for institutional memory

- you can have permissions for viewing files
- put your bank account info in the Files tab, and make it visible just to the administrator group
- put the constitution in the Files, and make it visible to everyone

Form builder

- you can use forms to have elections: people can vote for candidates
- you can send forms to non Yale student
- you can limit the number of responses, and have form deadlines

Messages

- create alumni lists
- can send messages to specific email lists e.g. alumni,
- ask people for non Yale email addresses before they leave (through a form), so you can keep them in a separate list
- doesn't archive

News

- like a newsletter. You can send it as email as well
- archives

public facing website

- you can add modules
- custom css
- like Yale outdoors
- everything can link to orgsync: like forms etc

user drawer

- when you click on your profile
- you can check the progress of all the forms you were submitting such as approved, denied or pending: good for checking status of funding requests

Funding and equipment

Primary sources

- UOFC grants
- Dwight hall
- cultural centers
- school of engineering
- women center

Secondary sources (a ton)

- Through Yale
 - Dean's discretionary, President's discretionary
- Outside sponsorships
 - let sponsors know how they will benefit for the event
 - Restaurants: donut crazy, panera etc

UOFC grants

- Guidelines: ycc.yale.edu/grant-guidelines
- They give out \$200,000 each year through Orgsync: takes 15 min to apply
- Go to Yale College Council -> Forms -> UOFC funding grant round 1 **Due Sep 27**
- if not registered with Dwight hall but still want to do some service activity, you can apply to the UOFC-Dwight hall grant
- these grants are flexible according to the amount of money you need
- **Criteria for decisions:**
 - the more details you give, the better
 - level of impact
 - demonstrated need
 - commitment to minimizing expenses
 - size and scope of organization
- You can register for multiple rounds of funding, e.g. for different events
- There will always be a bonus round for Fall 2018 activities
- **Sample timeline:**
 - submit application on sep 27
 - rare interview on sep 30 for large or ambiguous funding requests
 - decisions emailed by October 3
 - pick up cash on October 6 from the Business office, 55 Whitney avenue.
- you can apply for round 1, even if you have the activity in december
- **Appeals:**

- if application is partially funded or rejected
- you will meet with a finance manager to work on minimizing costs and expenses
- you will get the Appeals Committee to read your application
- **Business office:**
 - you will get the money in cash. It will be given to the treasurer on orgsync
 - over \$1000 cannot be given to you all at once
- **Prohibited expenses:**
 - upkeep of bank accounts
 - travel
 - events not targeted to Yale students
 - retroactive funding is also not always possible
- **Likely things to be funded**
 - invite guest speaker to campus and cover his metro north and residential college guest suite: this would be about \$100 in costs.
 - hosting a cultural celebration and want to buy some food

Budgeting

- must be very detailed
- what will you use the money for? How much do you need?
- Conferences usually cost around \$1000
- The headings of the excel sheet: Item, description of item, source, quantity, individual cost, total cost

Cutting costs

- Bas/DMCA equipment rental
- UOFC capital equipment program
 - free equipment to all student organization (so you shouldn't need to ask for these on the grants)
 - sound systems
 - microphones
 - tables
 - projector
- If you want to get **online donations**, and you are not a 501C3, you should put a disclaimer: "This is not a tax deductible gift" OR contact the Yale Office of Development so they can take care of the paperwork.

Bank accounts

- good for passing funds to next board
- good if frequently receiving large sums of money
- get an EIN: employment identification number from IRS

- get a checking account
- cannot be in Yale's name, use an abbreviation instead
- Citizen's Bank Clearly Better Business Checking has 0 monthly fee

501©(3) / Non profit status

- not usually encouraged because you need to file taxes and stuff
- but you don't get taxed on donations