Santa Barbara Newcomers Club
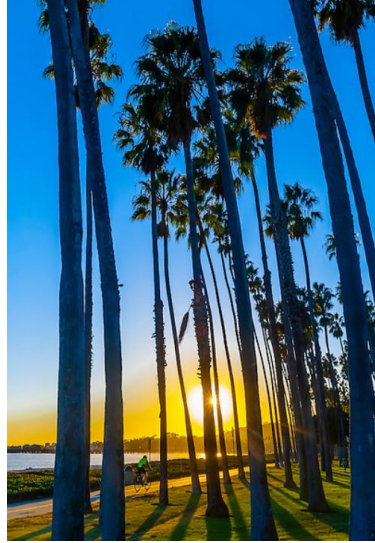
Committee Chair Training
January 27th

Welcome!

Carolyn O'Mara and Jenifer Beatty
Co-VPs of Activities

Agenda

Role of VP

Role of Chair

How to Plan an Event

Jotforms

Wild Apricot

Resources and Tips
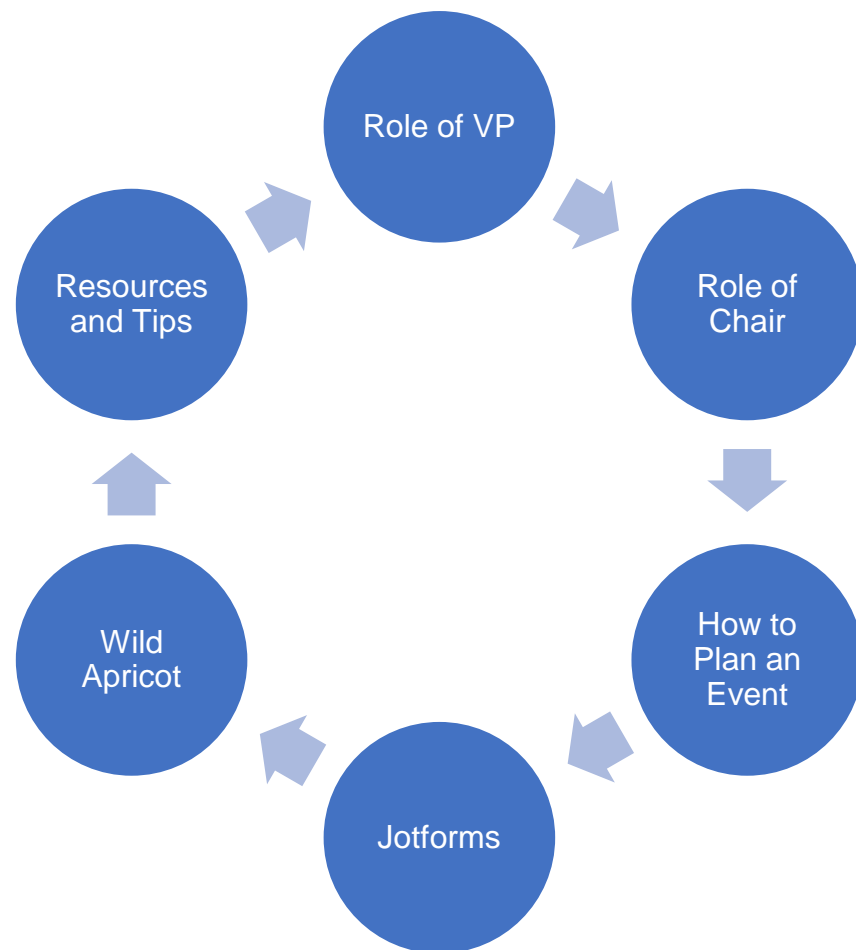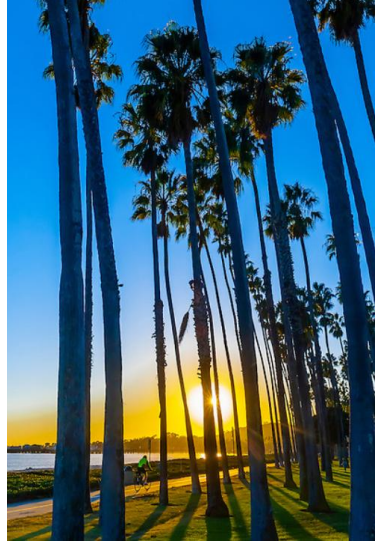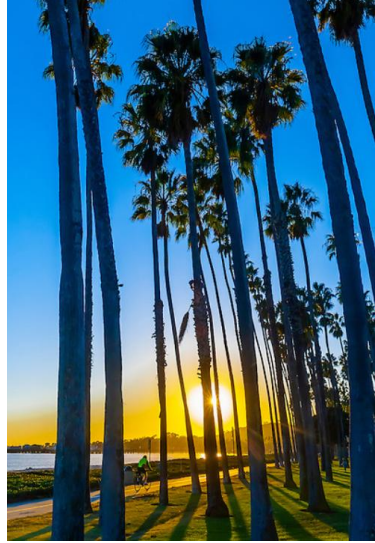
Santa Barbara Newcomers Club

Purpose Of The
Santa Barbara Newcomers Club

The purpose of the Club shall be to promote friendship and to aid in the social, cultural and philanthropic orientation of persons new to the Santa Barbara area.

SBNC Bylaws, Rev 7/17/23

Code of Conduct

All members of the Santa Barbara Newcomers Club shall:

● Treat all members with kindness and respect, and avoid demeaning, discriminatory or harassing speech or other similar behaviors.

● Be honest and truthful in all interactions with other members and when acting on behalf of the Club.

● Represent the Club in a respectful and dignified manner.

SBNC Bylaws, Rev 7/17/23

![Santa Barbara Newcomers Club logo]

Role of Activities VPs

1 Support Committee Chairs

2. Approve Jotforms

3. Watch Calendar for scheduling conflicts

4. Attend monthly Board meetings

5. Uphold the Purpose of the Club and Code of Conduct

Santa Barbara Newcomers Club
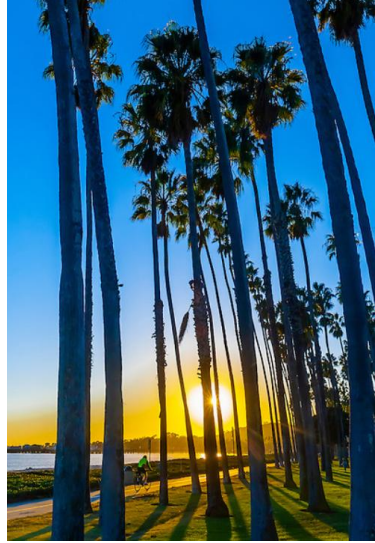
# Activities VPs Committee Assignments

Carolyn O'Mara

Arts

Afternoon Book Club

Beer Lovers

Games

Girls Night Out

Lawn Bowling

Newbie Meet & Greet/Orientation

Out to Lunch

Knitting

Pop Up

Sunday Social

TGIF

Weekend Amblers

Wellness

Wine Appreciation

Jenifer Beatty

Cycling

Dance Party

Dining In

Epicurious

Evening Books and Bites

Golf

Happy Hikers

Habelmos Espanol

Local Heritage

Mas Musica

Snow Sports

Theater Lovers

20-40 Somethings

Volunteers in Action

Roles of a Committee Chairperson

1. Oversee the execution of events

2. Hold monthly meetings

3. Attend monthly Board meetings

4. Uphold the Purpose of the Club, By-laws, and the Code of Conduct
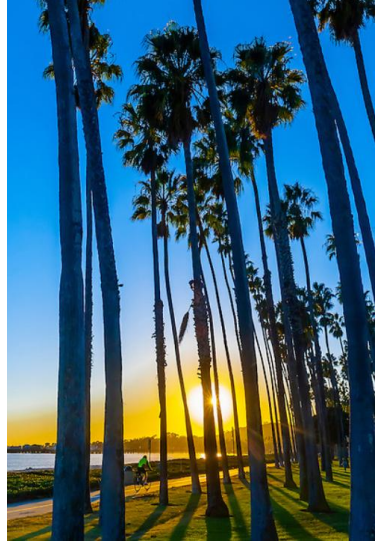
Executing a New Event

Committee Member

Chair enters here

Conceptualize an event → Prepare budget and **CHECK THE CALENDAR** → Create event description and gather JPEGs → Submit JotForm

Photos ← Day of event management ← Manage registrants ← Confirm posting content
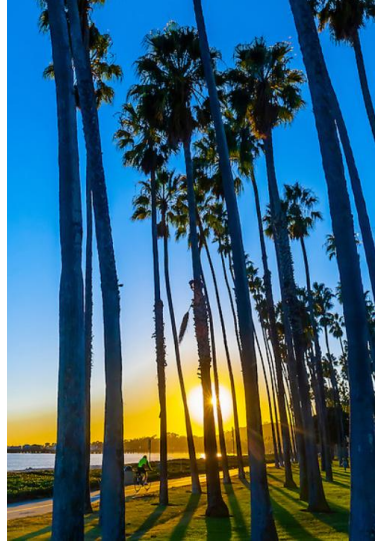
Job of Chair is Like a Director of a Play

Before event:

1. Oversee event and calendar
2. Submit jot form (4-6 weeks in advance) by noon Wed.
3. Monitor waitlist and offer refunds **if permitted**

After Event:

Submit pictures to marketing@sbnewcomers.org

# Santa Barbara Newcomers Club

Committee Members are the Actors

Before the event

1. Main point of contact with organization

2. Figure out budget/target cost per registrant

3. Submit to chair all details

4. Retrieve needed items from storage (i.e. red sign, nametags, table…)

6. Sign up as working committee before other registrants can sign up

7 Arrive early/stay late and act as host: **CIRCLE INTRODUCTIONS AND HIGHLIGHT NEWBIES!**

After the event:

1. Send multiple pictures to chair (vertical)
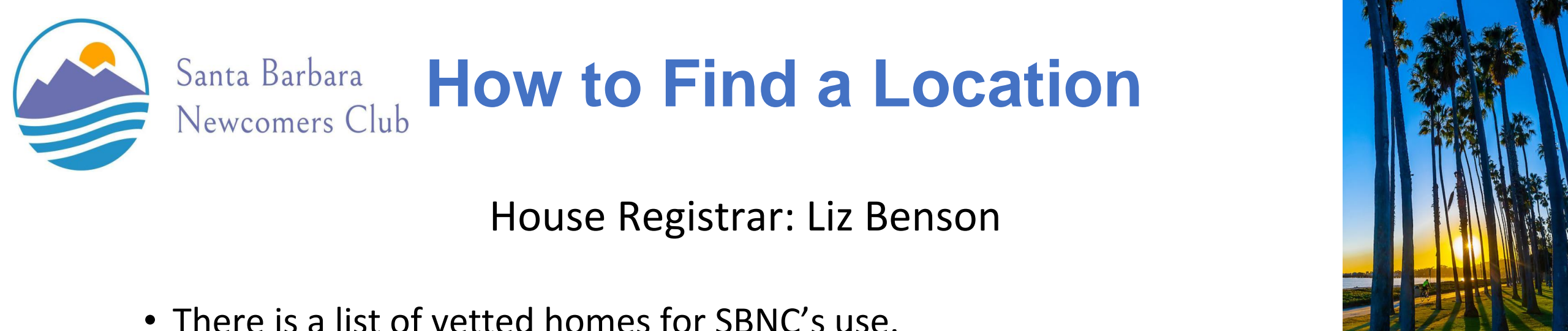
2. Return storage items
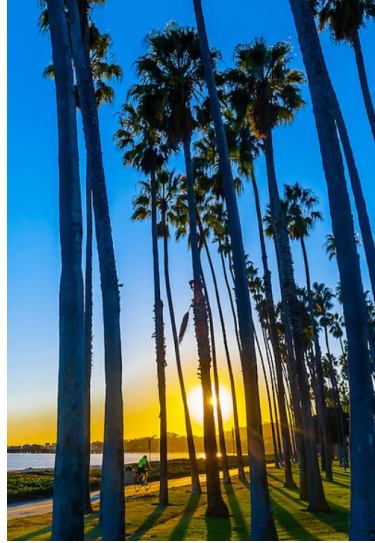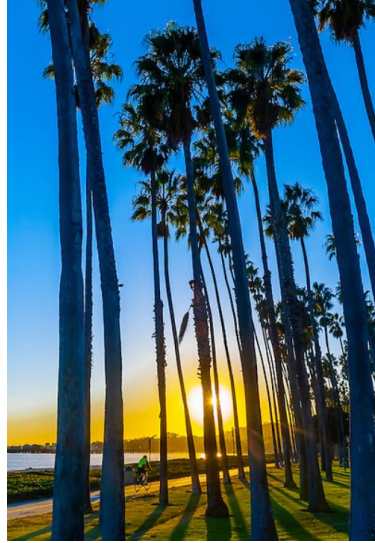
Event Planning - Budget

VPs of Activities will approve up to $1500.

President, Treasurer and VP Activities will approve over $1500.

How to Find a Location

Santa Barbara Newcomers Club

House Registrar: Liz Benson

- There is a list of vetted homes for SBNC's use.
- Chairs and their committees are encouraged to find new homes for events. Many of the hosts on the current list have hosted numerous events, especially those who can host above 20 guests
- Club Events (any posted event for which members register or sign up), can only be held at homes that have been vetted
  - This does not apply to commercial or public venues
  - A house does not need to be vetted for Committee meetings

For any questions or assistance, please reach out to: houses@sbnewcomers.org
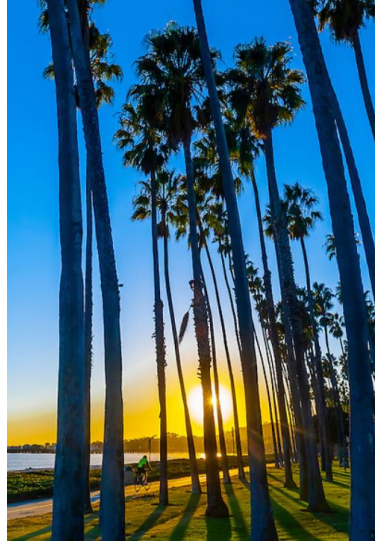
Non-Member Attendance Policy

- Each committee gets one non-member ticketed event per term

- Tell your VP of Activities before event is posted, not after

- Members have the ability to sign up first
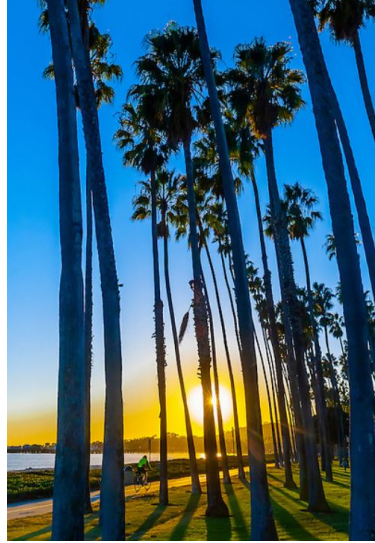
- Non-members will get a special code once turned public

Santa Barbara Newcomers Club

Storage Locker

- [Link to Storage Unit Details](#)

- Budget U-Stor: 130 Garden Street, Unit #3

- Passcode : 1956

- Hours: M-F 8:30am-5:30pm, S/S 9am-5pm
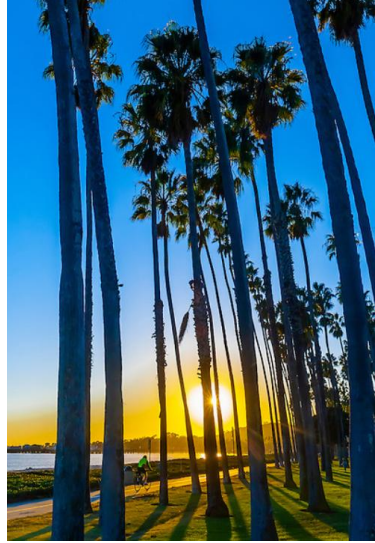
- Make sure you return items ASAP!

(Lip Up: Dirty!)

(Lip Down: Clean!)

Wild Apricot Functions

1. Jotform

2. Manage Your Registration List

3. Email your registrants

JotForm Instructions

1. Make sure you have a completed Event Write-Up, Photo/Logo and Budget ready.
2. If you have an electronic document for the Event Write-Up (even an email) open it in a separate tab in your browser.
3. Make sure the photo(s) or logo you want to use are in .png or .jpeg format. Download images to your desktop or open the email or text message where the images are available as attachments.
4. In a **NEW WINDOW,** open Wild Apricot website: https://www.sbnewcomers.org/
   a. Log in as Committee Chair: XXX@sbnewcomers.org   Password:
   b. Go to "Chairs" tab
   c. Click on "Forms" – blue box
   d. Click on "JotForm"
5. *Tip: Resize the Wild Apricot window to fill the left half of your screen and resize the window with your browser tabs to fill the right half of your screen - they should not be overlapping. This way you can copy and paste back and forth without having to navigate between tabs or windows.*
6. To fill out the JotForm, follow procedure in this presentation.

SUBMITTER CONTACT INFORMATION:

1. Enter your name
2. Enter your phone number
3. Enter your email

This information is used to contact you if there are questions about the event.

This information should "auto-fill" after the first time you complete the JotForm.

EVENT TYPE

What type of event is this? *

◉ Ticketed - for events requiring registration. (i.e. if you want to know who is attending the event) This should be selected for PAID EVENTS, as well as FREE EVENTS REQUIRING REGISTRATION

○ Public - for free events that DO NOT REQUIRE REGISTRATION, must be public location events (i.e. TGIF, Stride by the Tide, Weekend Amblers, etc)

○ A revision to an already posted or submitted event.

Event Details

Committee Name: *

> Test

Title of the Event: *

> Test Event

Event titles should be concise and under 70 characters so that they are best displayed on the calendar and eNews. Please refrain from sharing the event location in this title.

Is the LOCATION of the event written in the above Title of the Event? *

◉ No
○ Yes

EVENT TYPE:

Select your event type - most events will be TICKETED, requiring registration.

*If you need to make a REVISION to a previously submitted JotForm, choose this option - you'll be guided to provide your revised information.

EVENT DETAILS:
- Enter your committee name and the name of the Event

Do not include the actual location in the event title if at all possible- be creative! This is for security reasons since event titles are on the public Newcomers website.

EVENT DATE:

Click on the field, a calendar will populate, and you can click on the date.

EVENT COST:

If your event will be FREE, select "NO." In this case, there will be no budget section to fill out in the JotForm.

Most events have a cost associated, and you should have **Event Budget details** for this event. Select "YES," and this will prompt the next page to be the budget form.

Pop-up Question - This question is here as a reminder that, per the Newcomer by-laws, the answer should be "No." If you have questions, check with your VP for Activities.

Budget Approval Requirements

1. **Up to $1500:** VP of Activities Approval
2. **More than $1500:** VP of Activites, Treasurer, and President Approval

Instructions

1. Only fill in values for applicable Expense Categories
   - **Per Person Fees -** only fill in row 2 if this is a ticketed event such as a show, concert, or requires a admission ticket fee.

2. **Number of Paying Attendees:** The top highlighted yellow cell, is required to calculate the total cost.

3. **Minimum Cost to Run the Event:** Please indicate the minimum amount required to cover the essential expenses of this event. This is the lowest cost at which the event can proceed, even if the number of registrants does not meet the expected total.

   This figure should reflect the bare minimum needed to avoid a financial loss while still delivering a quality experience for attendees.

BUDGET APPROVALS:
All events that incur cost will be required to fill out the Budget Form section of the JotForm. When the JotForm is reviewed by your VP of Activities, the budget will be approved at the appropriate level.

BUDGET ENTRIES:
You only need to fill in the fields that apply to your event.

Expense Category	Directions	Subtotal
Total Number of Attendees	*Including Working Committee and free host/guest*	12
Per Person Fees (for shows, concerts, etc)	*Total per registrant, including taxes & fees*	10.00
Presenter/Artist.	*Including all taxes & credit card fees.*	100
Facility	*Including all taxes & credit card fees.*	
Rentals	*Including all taxes & credit card fees.*	
Food	*Including all fees, taxes, and 20% gratuity.*	50
Beverages	*Including all fees, taxes, and 20% gratuity*	
Other	*i.e. Gift Cards, Prizes, or other auxiliary expenses.*	
Subtotal		270
Wild Apricot Credit Card Fee	*5% of Subtotal*	13.5
Total Cost		**283.5**

TOTAL ATTENDEES:

Includes Working Committee and any non-paying Host (plus Host's Guests) as allowed by policy.

PER PERSON FEES:

Use this only for events where it applies.

OTHER EVENT EXPENSES:

Expenses can be broken out into these categories.

TOTAL COST:

The Budget Form will calculate the subtotal, credit card fees, and total cost.

Total Number of Paying Attendees		10
Total cost per person	*Includes $1 Admin Fee*	**29.35**
Minimum Registrants	*The bare minimum needed to avoid a financial loss.*	
When to Cancel	*Cancellation date if registration numbers have not been reached.*	

TOTAL COST PER PERSON:

Here you will enter the total number of Paying Attendees (vice the total number of attendees including non-paying Host, etc).

The Budget Form will calculate the total cost person. You will use this amount to determine what the ticket price for your event will be, which you will enter below.

MINIMUM REGISTRANTS/CANCELLATION:

Consider your FIXED COSTS to determine your break-even number of Paying Attendees. Check with your vendor or presenter to determine the date you need to cancel if you don't have a break-even enrollment.

TOTAL COST PER PERSON:

What you enter in this field will be the **Ticket Price** for the event.

It will usually be rounded up slightly from the actual Total Cost per Person, and allows you to account for total expenses if the event does not sell out. The objective is not to make a profit, but rather not to lose money if the event doesn't have the maximum number of Paying Attendees.

TAXES AND CREDIT CARD FEES:

This is a reminder to consider extra fees, especially for admission fees, or supplies, that are included in the budget as costs.

What is the "Total cost per person" listed in the table above? *

15

This will be the "Ticket Price" for your event. If you'd like to round that number up, please do so here.

Are all taxes, credit card fee %'s, and any other additional fees included in your subtotal? *

● Yes
○ No

RESTRICTED EVENT DETAILS

Restricted events require registration or an RSVP. If this event is open to the public, please select the "back" button below and under "What type of event?" select "Public".

Registration Opens (MUST be a Tuesday): *

[MM-DD-YYYY   📅]

If the event is submitted before noon on a Wednesday, registration can open as early as the upcoming Tuesday. However, if the event is submitted after that, it will not open for registration until the Tuesday two weeks from now.

Is this event going to be held in someone's home? *
- ○ No
- ○ Yes (If yes, please provide the address in the "Additional Information" box below)

RESTRICTED EVENT DETAILS:

Registration Opens:

Click on the field, and select the first Tuesday that is in **bold type**. The deadline for getting an event to be live for registration on a Tuesday is the previous Wednesday at noon.

Event in Someone's Home:

Select "YES" only for events held in a private home - it does not have to be a Committee member's home, or even a Newcomer's home, but the home must have been vetted by the SBNC House Registrar.

When and Where

Location Name: *

Location Name: (Private)

> Private Home - The address will be visible under "A
>
> Default text for "Private Home" locations to be used by posting team.

Location Address (public location only): *

Street Address

Street Address Line 2

City   State / Province

Postal / Zip Code

EVENT LOCATION:

Enter the name of the location - such as "Santa Barbara Rescue Mission." For private residences, you can put "Private Home" in this field.

Enter the street address of the location.

For Private Homes - this information will only be provided to the registrants in the Reminder Emails.

For Public Locations - this information will be part of the Event Listing details (not the Event Title) available to be viewed by Newcomers on the Event Calendar.

EVENT DATE:

The event date should pre-populate from the date entered earlier.

EVENT TIME:

Enter the beginning and ending times. Be careful to confirm AM or PM on the time.

Is this event a series? *

○ No
● Yes

What are the registration requirements for this event? *

○ Option 1: None – does not require registration, this is a public reoccuring event.
○ Option 2: (most common) Registration is required for each reoccuring event date.
○ Option 3: (not common) One Time Registration - members register once and are enrolled for every reoccuring event following that.

Frequency of event *

○ Daily
○ Weekly
○ Monthly
○ Annually
○ Other

Please list all of the dates that this event should take place. *

End date of event series *

[MM-DD-YYYY   📅]

i.e. the final date this event should take place

SERIAL EVENTS:

This option should be used for events that take place over a series of days or times… such as a golf clinic that will happen over four Saturdays (Option 3).

Enter the details as they apply to your event. If you have questions, confer with your VP for Activities before you complete the JotForm.

EVENT PICTURE

Find the Event Photo or Logo you downloaded earlier, or open the document where you have the image attached.

Drag it over to the JotForm browser window and into the "Browse Files" box.

Alternatively, you can click the "Browse Files" box, and it will open your Finder or file directory on your computer where you can select the image file(s) you want to use.

A thumbprint of the photo(s) should appear below the box with the file name.

You can upload up to 2 photos here.

EVENT DESCRIPTION:

Include an INVITING and COMPELLING description of your event!! You have space for a couple of paragraphs to get Newcomers excited to attend your event!

COPY the event description and PASTE into the Event Description field – or type it in, if you don't have a source document.

Check that the paragraphs are separated properly. You may need to insert spaces between the paragraphs.

Upload Event Picture Here:

☁↑

Browse Files

Drag and drop files here

Pictures must be in jpg, jpeg, or png format. Max upload is 2 pictures.

Event Description: *
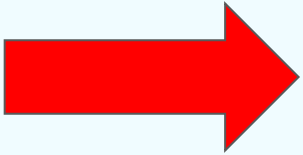
Type here...

Additional Event Information - sent to REGISTRANTS only *
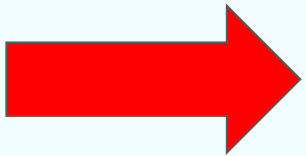
Type here...

A good example of information to put in here would be driving directions, parking instructions, or a PRIVATE ADDRESS.

ADDITIONAL INFORMATION:

Enter any additional information for registrants only - such as parking instructions, or dress code.

REGISTRATION SETTINGS:

Confirm the number of registrants you want for the event.

Respond "YES" to the question about opening the waitlist if registration fills.

Ticket Types

Who can register for this event? *

☑ Working Committee (committee members working the event)

☑ Newbies

☑ Newcomers (including Extended Newcomers)

☐ Hosts (for events held in a private home where a member is the home host)

Ticket Price (autofilled - if this is incorrect, or you would like to round up, please return to page 2 to review your budget submissions) *

`15`

By default all registrants will be charged this rate upon registration (including working committee members and hosts). If a different price should be applied for working committee members or hosts, please explain why in the Comments for Activities VPs and/or Posting Team at the end of this form.

Number of Working Committee Members: *

`ex: 2 (minimum of 1 required)`

Max 1 per every 4 guests.

Working Committee and/or home Host Registration Passcode *

Enter a passcode that the working committee and/or host member(s) will use to register.

Registration Closes: *

`01-20-2025`

This can be on the event date, or any day prior. Default is the day prior to the event. This is the date that registration closes for all members, including working committee and hosts.

TICKET TYPES:

The default is pre-populated. This is fine unless you want to invite a HOST who is not a NEWCOMER. (See SBNC rules for hosts)

TICKET PRICE:

The ticket price from the Budget Form section of the JotForm will pre-populate here.

WORKING COMMITTEE:

Enter the number of Working Committee members.

Enter the passcode: **(your passcode here)**

REGISTRATION CLOSES DATE:

This date will pre-populate.

WHO SHOULD MEMBERS CONTACT:

Your choice - registrants can be directed to the Committee Chair(s) or the relevant Working Committee member (a pop-up will allow you to enter the Working Committee member's name)

COMMITTEE NAME:

This will pre-populate.

WHICH EMAILS TO BE COPIED ON:

Your choice - you can decide which emails you want to receive. You can also track registration information in Wild Apricot.

COMMENTS FOR ACTIVITIES VPS:

Comments for Activities VPs and/or Posting Team

Leave blank unless there are any unusual conditions that you want to explain to the VP for Activities.

THAT'S IT - HIT "NEXT" AND ON THE NEXT PAGE HIT "SUBMIT."

CONGRATULATIONS!

Final JotForm Tips

1. Once you have successfully submitted the JotForm, you'll get a new window that allows you to crea[] a new one, or close out.

2. You should receive an email confirmation that your JotForm was successfully submitted. Update any log that you might keep with the date you submitted the JotForm and the date the registration will open.

3. It's a good idea to check on Sundays, when the E-News comes out, that the events you have posted are on the Event Calendar, and read over them to make sure they are correct. If you need to make corrections or adjustments, you can open a new JotForm and under EVENT TYPE, select the "Revision to an already posted or submitted event" and enter your requested corrections. If needed, send an email or text to your VP for Activities. ONLY the VP of Activities and the Posting folks on the SBNC Board can/should make changes to the Event once it's in the system.

4. Once you've confirmed that the Event is on the Event Calendar, send an email and/or text to the Working Committee members and ask that they register for the Event as Working Committee - using the passcode - otherwise the Event may get filled up without them. Working Committee can pre-register on Sunday and Monday before the event is open for regular registration.

Wild Apricot Functions

1. Jotform

2. Manage Your Registration List

3. Email your registrants
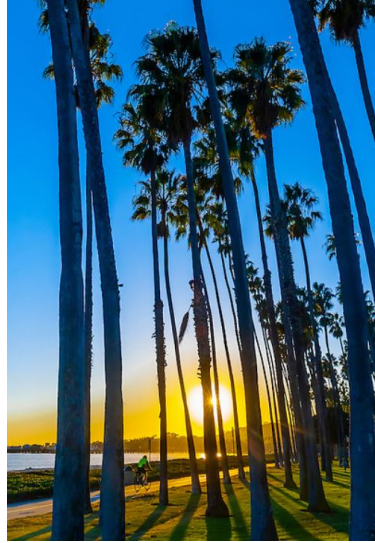
Manage Your Registration List

Check the Waitlist

Beer Lovers: We Got Annex (Registration Opens December 31)

January 20, 2025, 6:00 PM – 9:00 PM @ Validation Ale Annex at 2840 De La Vina St, Santa Barbara CA 93105

Visible to **Restricted levels/groups** 🔒

Allow registration ⬤ | Registration is enabled.

Event details	Registration form	Ticket types & settings	Emails	Registrants & Invitees	Waitlist & settings

Basic information

Description

Reach Out to Members on the Waitlist: Newbies First!

Name	Joined waitlist	Registration details	Status
Puma, Cathy	29 Dec 2024, 8:58 AM	Newcomers (including Extended Newcomer	On waitlist
HOUSTON, MOLLY	31 Dec 2024, 4:29 PM	Newcomers (including Extended Newcomer	On waitlist
Brakeman, Amy	14 Jan 2025, 8:52 PM	Newcomers (including Extended Newcomer	On waitlist
Henry, Tom	14 Jan 2025, 8:53 PM	Newcomers (including Extended Newcomer	On waitlist

Register New Member and Generate an Invoice

nt registration form

Share registration	❌ Show registration on event registrants list
First name	Cathy
Last name	Puma
e-Mail	pumacathy@gmail.com
Phone	2069090954
Street Address	671 Winslow Way W.
City	Bainbridge Island
Zip Code	98110
SBNC Event Waiver & Media Release	✔ SBNC Event Waiver & Media Release
Organization	
Prospect Contact Type	

Waitlist registration details

Date joined	January 18, 2025, 4:25 PM
Ticket type	Newcomers (including Extended Newcomers)
Total amount	$0.00
Status	On waitlist

[Register now]

[Send email]

Internal notes

Find the Registrant Who Has to Cancel

Cancel Registrant

* Remember - you can cancel a REGISTRANT, but only VP's can CANCEL an EVENT

Cancel Registrant

Cancel registration for Wade Appelman

Invoice #51065 will be voided.
Settled payment will be removed from invoice.

Reason for cancelling registration:
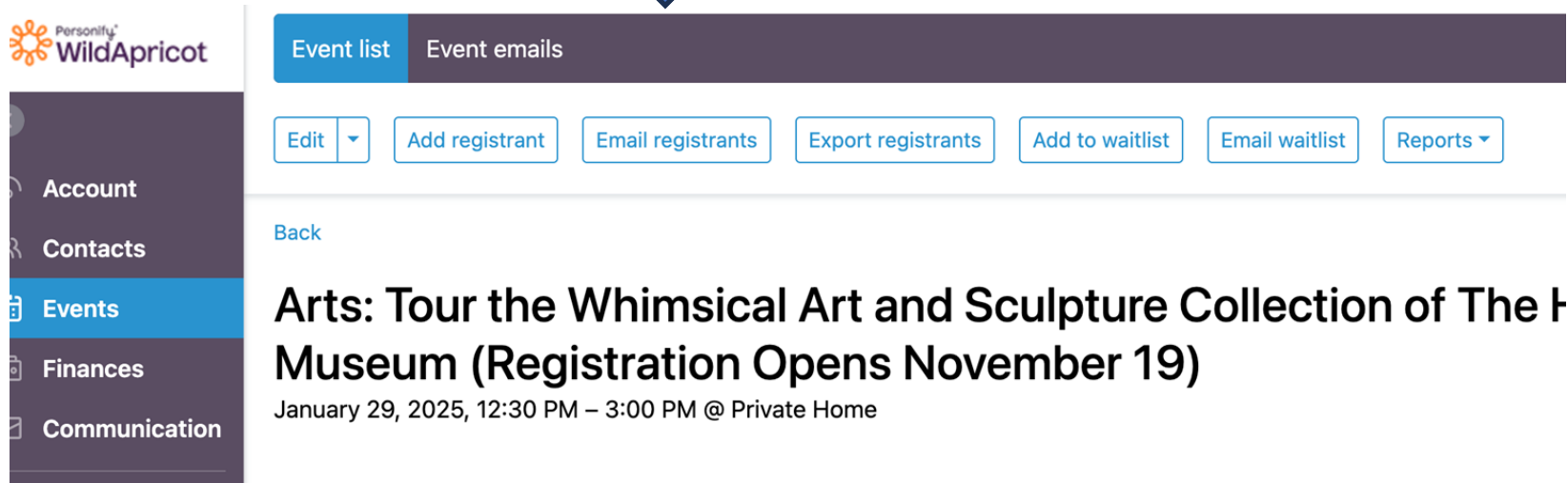
Jane Doe will replace Wade Appelman

Cancel registration   Close

In order for the person who is cancelling to be reimbursed, you must enter the full name of the person who will take their place HERE as the *"Reason for cancelling registration"*

E-mailing your Registrants

E-mailing your Registrants

E-mailing your Registrants

Fill in a title and the body of the email

E-mailing your Registrants

1. TEMPLATES   2. DESIGN   3. PREVIEW   4. RECIPIENTS   5. REVIEW AND SEND

Save ✔ Saved at 2:28 PM

Choose recipients and subject

Recipients: 🧑‍🤝‍🧑 **Current event registrants**

+ Contact   + Contact list   Clear all recipients

Change the subject line

➡️

Subject: A Message from Santa Barbara Newcomers   {}

Type { to see available macros

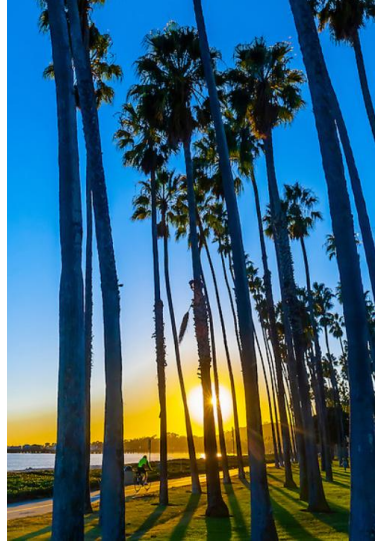Reply to: VP Activities BoardMember E   activities@sbnewcomers.org   Change reply to

Tracking: ☑ Enable link and open email tracking
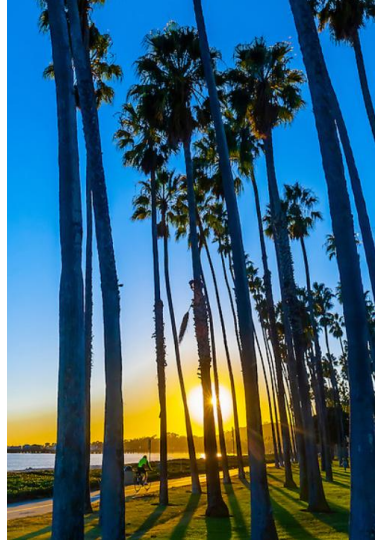
Reimbursements

- Any member can submit a request for event reimbursement

- No more FAR … no longer a chair responsibility to submit for entire committee

- First Time Only to access the "Bill.com Expense and Spend System":
  - Request access by mailing: expense@sbnewcomers.org
    - Name & email address is all that is required
  - Within 24 hours you will get a system email to set a password
  - Once logged on you will be prompted to enter the following: (this is information is encrypted by the site and not accessible by our club.. This is only done at sign-up)
    - Birthdate (this is mandatory by law)
    - Bank information (as your will get your reimbursement as a direct deposit)

- To see your account or request reimbursement
  - Login to website or on phone
  - Track payments and submit expenses

To Request Reimbursement (Browser Option)

SANTA BARBARA Newcomers Club

bill SPEND & EXPENSE
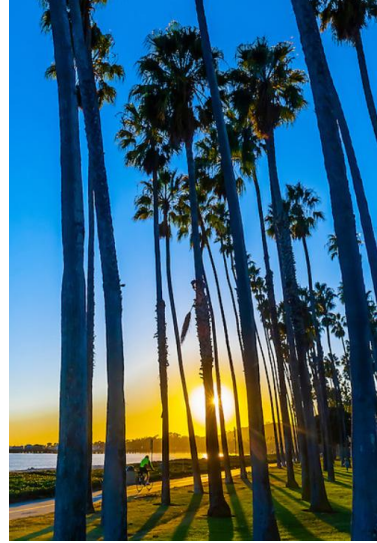
- Login to site:
  https://app.divvy.co/login
  - Email address and password you set @ signup

- Phone App:
  - Search for "bill spend and expense"

Reimbursement Screen

- Combine all of your receipts for one event on a single submission

- Merchant:
  - Can be all on one line (CVS, Costco, Total Wines)

- Reimbursement amount:
  - Total of all your receipts for that event

- Transaction Date:
  - Date of your event

- Budget:
  - Select "Member Reimbursement"

- Business Purpose:
  - Description of items purchased ("wine for Presidents party & cheese board"

- Receipts
  - Add all receipts which show total amount from all vendors

- Committee Name:
  - Select the committee the event is sponsored by

- Event Date:
  - Date of your event

- Event Name:
  - What was the event called

Don't forget to add mandatory receipts

New reimbursement

Out of pocket

Details

Merchant*

Enter merchant name

Reimbursement amount*

$0.00

Transaction date*

Date of transaction

Required fields

Budget*

Member Reimbursement

Business purpose*

Include a reason for this request

Receipts*

➕

Required for Member Reimbursement (3)*

* Committee Name

🔍 Select...

Name of the Committee

* Event Date

🔍 Select...

Date the event was held - (i.e. Jan 10, 2025) (Then press + Create New Value below)

* Event Name

🔍 Select...

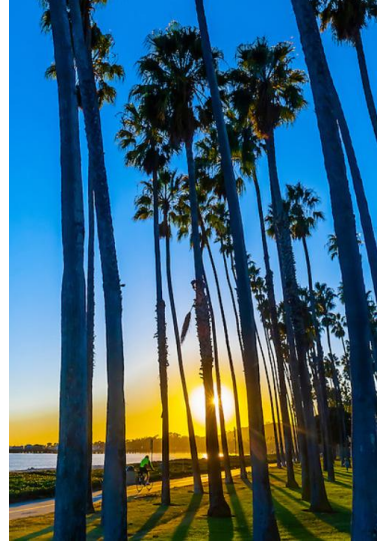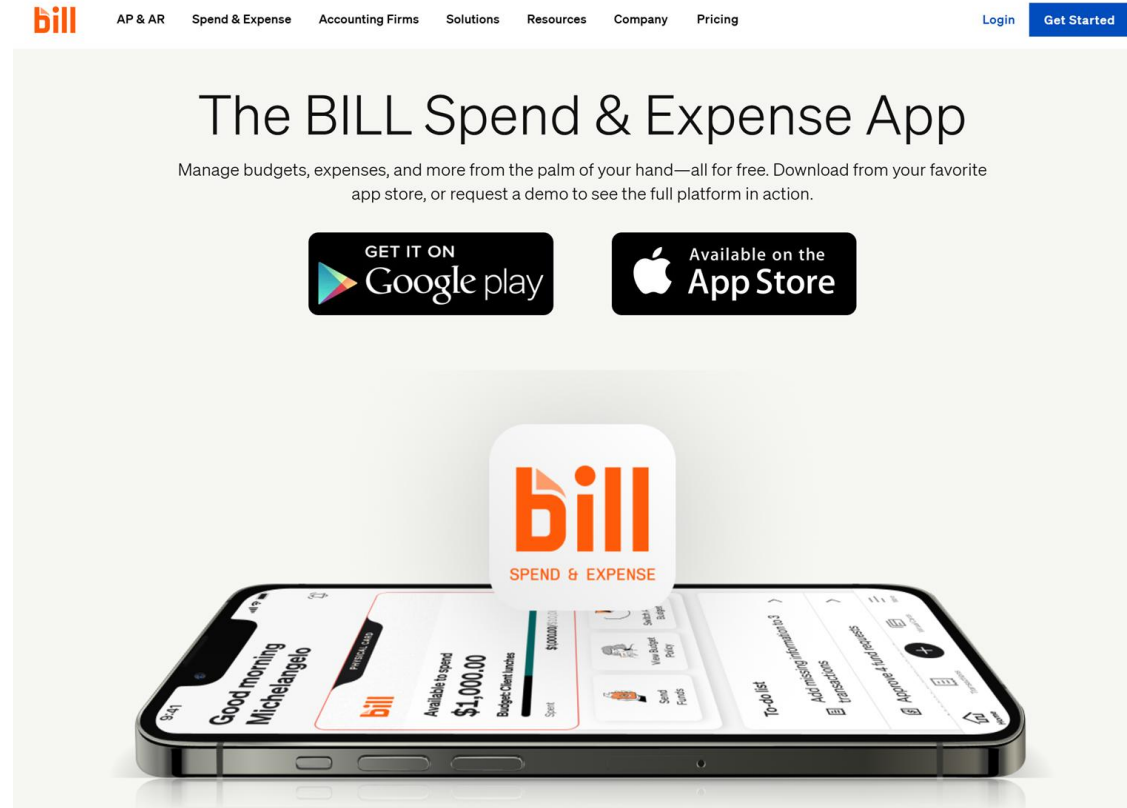Enter Name of the event - (i.e. 80's Dance Party) (Then press + Create New Value below)

Reimbursement total: $0.00

Funds will be deposited to bank account •••• 69. Change
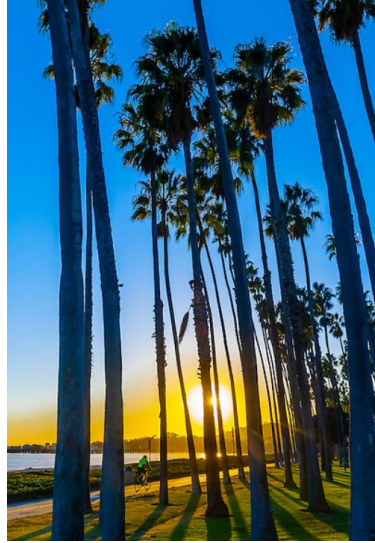Once approved, this can take 5 - 8 business days

Request

Phone App

- Search on App Store for "Bill Spend & Expense"
- Login (after getting your password)
- Submit by taking a picture of your receipt

A Few Reminders

- Setup your access ASAP if you expect to have expenses
- Download the phone app as option
- Let others on your committee know to setup an account too if they will have expenses this term
- You will see something about credit cards. This is DISABLED
- Once approved, transfers will occur in 24-48 hours. Check your dashboard for status
- Questions: email expense@sbnewcomers.org

Best Practices- Do
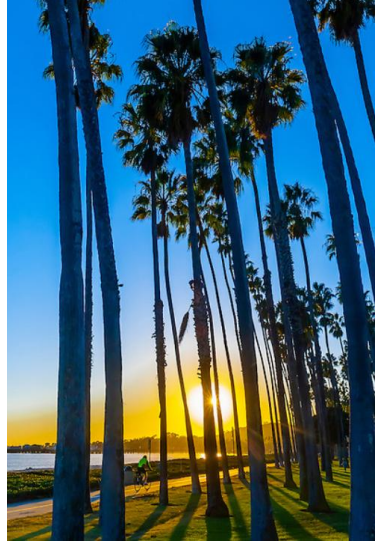
- Engage with your Activity VP early especially for large or unique events: Jotforms are proposals

- Sign up for events you will be attending with your personal (not Admin) credentials

- Know the Club's Bylaws, Policies & Procedures, and Chair Guidelines

- Remember club members cannot be paid or profit from SBNC events

- Encourage your committee members to tip their servers well

- Read all Club communication such as: E-News, President's letter, Board Packets, etc.

- Do offer events in a variety of price ranges

Best Practices- Don't

- Submit a JotForm after the deadline and expect to see your event posted the same week.
- Feel the need to include us in every email.
- Tweak your event after it is posted. All you do in WA is manage the waitlist, email registrants and print nametags.
- Cancel an event yourself- let your Activities VP do it.
- Promote businesses or raise funds for any organizations. All events need to have an educational, service, or entertainment component for our members.
- Forget to give newbies special focus and attention
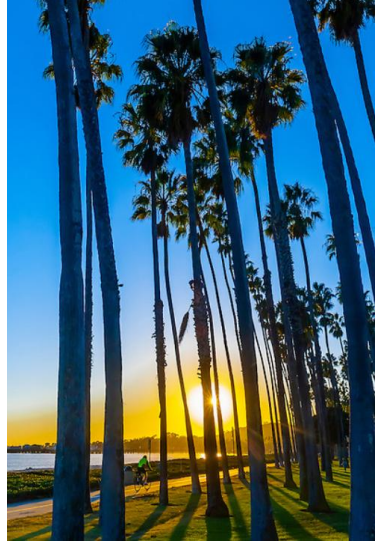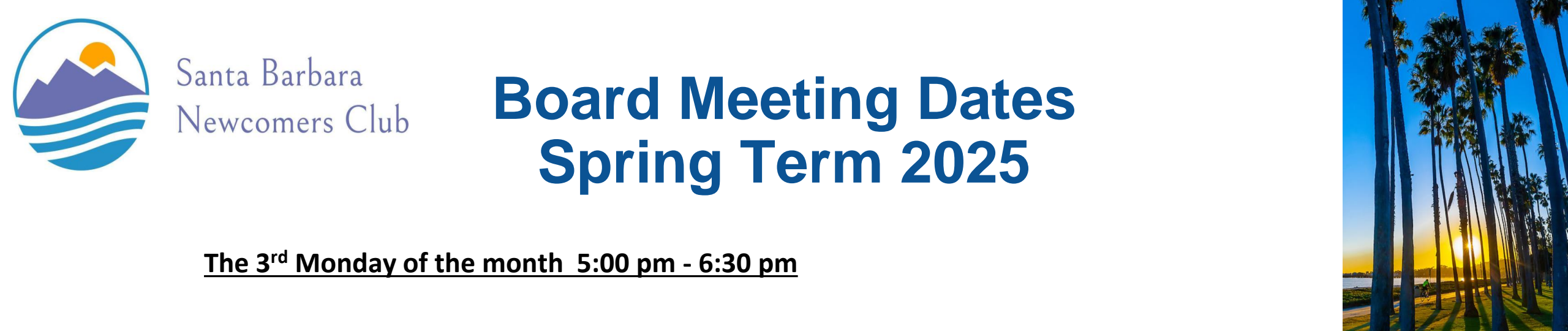
Board Meeting Dates
Spring Term 2025

The 3rd Monday of the month 5:00 pm - 6:30 pm

- Tuesday February 18, 2025 (Women's Club)
- Monday March 17, 2025   (Hayes Hall   1740 Cliff Drive)
- Monday, April 21, 2025
- Monday, May 19, 2025
- Monday, June 16, 2025
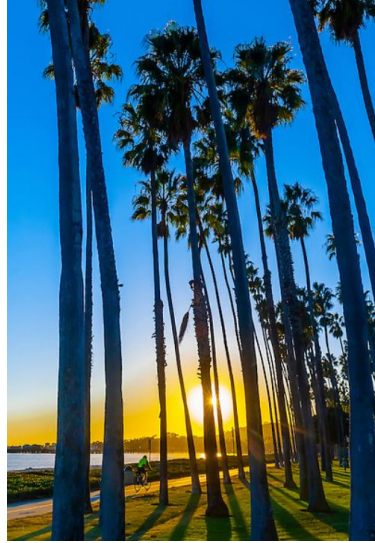- Monday, July 21, 2025
- Monday August 18, 2025

Let's Explore Wild Apricot

Email: <u>caroblockisland@aol.com</u>

Password: IloveSBNC2025!

SSID:Compass Guest

PW: findyourhome

Thank you!!

Carolyn O'Mara
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(917) 355-6633

Jenifer Beatty
jeniferbeatty1@gmail.com
(916) 747-7971