

# Staff Register Campus Organizations Orientation

ARTS AND EVENTS

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## Mission

Staff Registered Campus Organizations (RCOs) enhance opportunities for the UCSF staff community to socialize and learn on an intellectual level while creating a sense of

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# Program 1



**Andrea Fuller**

Admin Officer,  
CLS Operations



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Project Manager,  
CLS Operations

# FY26-27 Staff RCO Cycle Template

\*biennial cycles



June 15  
20  
Open Re

★ May  
Last Da  
Pur

June  
End of

June  
Applicatio  
F

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# Program Basics

- RCO Period for F
- Last Day to Make
- Unused funds do
- Must have four (4
- Only officers can reimbursement (v

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# Program Basics

- 1) **Email:** Staff
  - Subject
  - Example Invoice
- 2) **Group Port**
  - Autom
  - Group

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# Registration

- All staff RC with Arts and  
\*Off cycle on a case  
1) Registr  
2) Officer
- Benefits
  - Provide
  - Ability t
  - Reserve

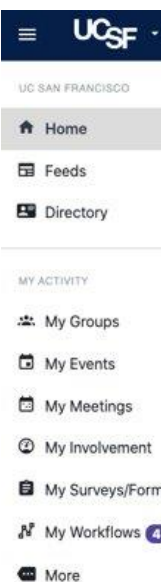
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# Group P

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# Group Portal

- One stop shop for all your Staff RCO needs
- All Staff RCOs have access
- Groups.ucsf.edu or through MyAccess
- Activating a Group Portal Account = Log in once



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# Group Portal - Events

## General Info



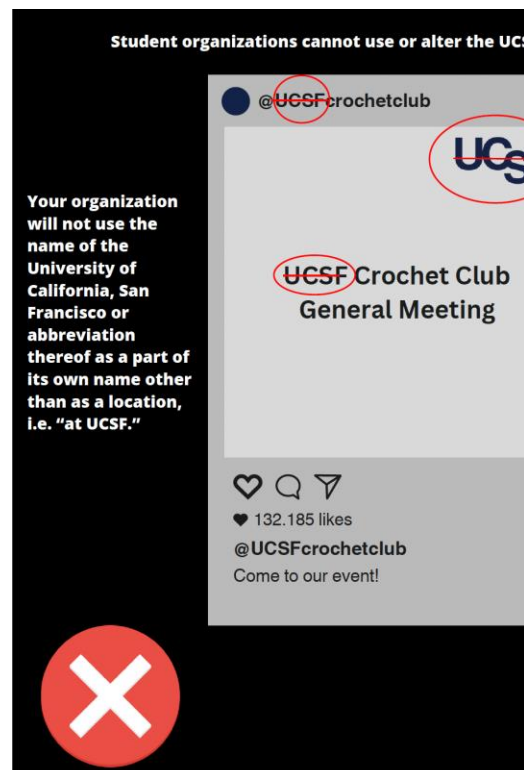
- All events, virtual must have a designated event officer in Group Portal section two
  - *\*Events not on campus may not be held in event equipment*
- By creating an event
  - Request
  - Reserve
  - Areas
  - Submit
- On-campus events must be booked through the Group Portal
- When marketing an event, follow UCSF policy

# Group Portal - Events

Proper marketing guidelines at  
UCSF

To ensure UCSF policies are met surrounding your event's marketing material, whether through physical or online postings, please refer to UCSF Policy 250-13: [Use of University Name, Seal, Logo and Brand Identity](#)

## INCORRECT POST



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# Group Portal - Events

## Disclaimer Language

- Please add any and all for Staff Group
  - *[RCO M UCSF. M herein c Regent Health,*
- Must be displayed
  - Live at
  - Event
  - Ticket
  - Calend
  - Article
  - Social

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# Group Portal - Events

## Space Reservations

- Classroom
  - Reservations
  - slide for
- Conference Center (“Campus”)
  - Faculty
  - Lange
  - Millbern Center
  - Mission Conference

# Group Portal - Events

## Potential Additional Fees

- **ETS (Educational Technology Services)**
  - ETS Fees
    - Teaching Center live streaming
  - Equipment rentals
    - [AV equipment rentals](#)
- **Facilities** (chairs, and tables)
  - Classroom lockers
    - Locks are not available during the event
  - Room lockers
    - Locks are not available during the event
- Indicate the number of people completing the registration
- Event policies
  - [19 event policies](#)

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# Group Portal - Events

## Event Reservations for Classroom Spaces



- Each ac
  - Fall
  - Win
  - Spr
  - Sum(subject

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# Group Portal - Events

## Steps for Submitting Event Request

**Video on How To Submit Event:**

<https://player.vimeo.com/video/351696374>

To submit an e

- Login to G
- Navigate to
- Click on “E
- Click on “C
- Click on “C
- Click on “C  
location se  
Special Us
- Fill out each  
on “**Submi**
  - *Space  
review.  
please  
availab*
  - Group  
[page -](#)

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# Group Portal - Events

## Private Events

- If you wish to make an event private, please contact the Group Portal team before submitting your request.
- Please allow 2-3 weeks for processing.

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# Group Portal - Events

## Accessibility Considerations

- Review the  
  - <https://>
- Venue (accessibility and accessibility interpreters)
- Food (allergies)
- Presentation (describe video)
- Marketing (statement)
  - *UCSF will provide reasonable accommodations because at [event]*

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# Group Portal - Events

## Sustainability – Green Events

- Review the material:
  - [UCSF C](#)
  - [Finding](#)
  - [Zero W](#)
- Apply for a

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# Group Portal - Events

## Cancellations

- If you wish to cancel the event
- To cancel the event, please email [StaffRCO@utoronto.ca](mailto:StaffRCO@utoronto.ca)
- *Depending on charges*

# Group Portal - Events

## Event Liability



- Most on-campus University activities and the activities will be required through Ca
- RCO events by the University able to purchase Connexion
- For any RCO each participant collect and

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# Group Portal – Training Videos

## How-To Videos

- Most Popular  
  - [Group](#)
  - [Manag](#)
  - [Registe](#)
  - [Renew](#)
  - [Submit](#)

\*\*includes how  
sale requests

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# Funding Purcha

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# Purchasing Guidelines

## Funding Budget

### Eligible Expenses

- All expenses for  
procedures
  - Gift Cards
  - CLS Cards

### Ineligible Expenses

- Alcohol
- Payments to  
students
- Parking fees

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# Purchasing Guidelines

## PO Request Form

- All purchases for RCO groups must be submitted through [Staff RCO Request Form - Click here.](#)
  - Requests should be submitted at least 7-10 business days before your expected date
  - For Request Type – Select the request type you wish to submit.
  - For Reimbursements, please email [StaffRCO@ucsf.edu](mailto:StaffRCO@ucsf.edu) for approval before making any purchases.

# Funding and Purchasing Guidelines

## General Info



- All purchases for Life Services
- All purchases on card
- No reimbursement for approved b
  - Please get approval for reimbursement
  - Note: If there is a process

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# Purchasing Guidelines

## Honorariums

- Type of activity
  - Special occasion
  - Short-term guest
  - A special event
  - Appraisal of professional services
- The following honorariums are approved by the Organizational Committee
  - UC faculty
- Honorariums for Bearbuy –

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# Purchasing Guidelines

## How to Make a Purchase When Vendor IS in Bearbuy

1. Obtain quote/proposal and vendor accepts Purchase Order.
2. Submit a request for quote. CLS Admin issues PO.
3. Supply Chain Manager and CLS Admin issues invoice. \*Note: Vendor must register for payment (how to register for payment).
4. Vendor to submit invoice for goods/services received and communicate with CLS Admin to submit for payment.
  - \*Do not open invoice until processed by CLS Admin. Vendor supply (general ledger) purchases can be processed by CLS Admin.

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# Funding and Purchasing Guidelines

## How to Make a Purchase When Vendor IS NOT in Bearbuy



1. Email [StaffRCO@ucsf.edu](mailto:StaffRCO@ucsf.edu) as the vendor name and set up in BearBuy and add to the UCSF Supplier List.
2. Obtain a quote from the vendor.
3. Provide the quote request with your purchase request 2 before this submission.
4. Supply Chain Management will relay the PO to the vendor.
  - o \*Vendor will also need to register for TradeAgree.
5. Your vendor will invoice you once goods & services are received.

**Important:** Please be aware that this is the only method to

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# Purchasing Guidelines

## Process for Honoraria Requests

Guest speakers must  
gain approval before  
to be submitted 4.

1. UCSF Supplemental Request Form
  - Please provide a copy of the CLS P
2. The date(s) and time(s)
3. Flyer or announcement invitation letter
4. Attach all documents

*Note: Honorarium  
above steps are for*

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# Purchasing Guidelines

## America To Go and Moffitt Catering

- America To Go can be found in BearBuy
- Go to America To Go sections to see the menus
- Fill out CLS Procurement Form (slide 24)
- Make sure to include accurate building, address, room number, time, date, etc. in *Delivery Instructions*
  - Need Onsite Contact name and number
  - Attach screenshot of what you want to purchase



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# Funding and Purchasing Guidelines

## America To Go



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# Funding and Purchasing Guidelines

## Eligible Expenses

- All Staff RO types of ev
  - Cultural
  - Artistic
  - Profess
  - Recruit
  - Organiz

# Fundraising Guidelines

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- Staff RCO Groups cannot use RCO funding could not be used
  - Giving Form Link - Click Here
    - \*Note: Only one Department can indicate which group
    - Gift Transmittal Form
    - Donor Benefit: All gifts
    - Gift Tax: ~10% total
  - Identify a Staff RCO Office individual or these individuals with this fundraiser.
  - ⑩ \*Note: The reimbursement raised by the Staff RCO Group
  - ⑩ If the original upfront costs their losses.
  - ⑩ The funds raised at an event or fundraiser it is being
  - If Fundraiser is < \$5k: the money as outlined in the G collection or distribution of Member facilitating.
  - If Fundraiser is >\$5k: Please

# Funding and Purchasing Guidelines

Learn the Lingo 101

- PO = Purchase Order
- P-Card = Corporate Card
- COA (Charitable Contribution Acknowledgment) = Payment Information
- Quote = Estimate
  - Requires a quote request form
- Invoice = Bill
- BearBuy = Online purchasing system for purchases
- Transcepta = Vendor self-service portal
- Honorarium = Payment to an individual's services; distinguish from honorarium by setting a fixed amount

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# Outreach Opportunities

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# Tabling Opportunities

- Unfortunately, we have fewer Staff
- Instead, we will have more tables at A&E (events with more staff will be sent to other locations)

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# Final Rem

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# Campus Policies



Please review all policies including but not limited to:

- [RCO](#)
- [Educational Technology](#)
- [University of California Organizations, and](#)
- [Use of University Network](#)
- [Alcohol Policy](#)
- [Fundraising Guidelines](#)
- [Fire Marshall Guidelines](#)
- [EH&S Guidelines for](#)
- [Requesting an Honor](#)
- [Meeting and Entertainment](#)
- [Advocacy Guidelines](#)

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## Every Staff RCO should be aware

Any RCO that does  
registration, event re

You may not get rein  
funding sources with  
days notice needed

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# Question

If you have any questions regarding  
reach out to Arts and Events, who is  
your Staff RCO.

[StaffRCO@ucsf.](mailto:StaffRCO@ucsf.)