College of Engineering Student Team and Club Orientation

October 2022

TODAY'S AGENDA

9:00-9:05   Welcome & Orientation Overview

9:05-9:10   Center for Student Involvement

9:10-9:25   Room use and expectations, reservations and how to use
            COWS, college news and social media, E-Week

9:25-9:35   Fundraising, gift accounts, interacting with alumni

9:35-9:45   Reimbursement, travel, conference registration

9:45-10:00   Q&A

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UP NEXT...

Center for Student Involvement:

CSI

Working with the Center for Student Involvement (CSI)

Dr. Paul Cody
pvcody@ucdavis.edu

https://aggielife.ucdavis.edu/meetings/1846355/paul-cody_meeting

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CSI Resources

- Communicating to campus/potential members
  - https://csi.ucdavis.edu/communication-tools/
- CSI Bulletin – sent out every Wednesday evenings to RSO leaders

- Room Reservations
  - 4 hours weekly meeting and 3 special events per quarter
- Policy Page https://csi.ucdavis.edu/policies-and-guidelines/
  - Posting (classrooms around campus)
  - Fundraising (money going from one person to another virtual/in person) ex Venmo or cash
    - Sales - shirts, water bottles, bake sales
    - https://csi.ucdavis.edu/fundraising/
    - Things you can do not listed on CSI website
      - Catering and Concessions at campus events
- Grants https://csi.ucdavis.edu/grants/
  - Club Finance Council- https://csi.ucdavis.edu/cfc/
  - Pepsi Product-https://csi.ucdavis.edu/pepsi-product-funding/
  - Beyond Tolerance -https://csi.ucdavis.edu/beyond-tolerance/
- Agency Accounts - https://csi.ucdavis.edu/agency-accounts/
- Managing Group Funds - https://csi.ucdavis.edu/managing-group-funds/
  - Applying for EIN https://csi.ucdavis.edu/wp-content/uploads/2020/10/How-to-Apply-for-EIN.pdf

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Aggie Life

https://csi.ucdavis.edu/aggielife/

Center for Student Involvement

- Update leaders at any time   https://csi.ucdavis.edu/changing-your-primary-leaders/

- MU Table Reservations   https://memorialunion.ucdavis.edu/reservations

- CSI Conference Room   https://csi.ucdavis.edu/csi-conference-room/

- Leadership Library   https://csi.ucdavis.edu/leadership-library/

- CLEAR (Custom Leadership Education and Resources) Workshops

    https://csi.ucdavis.edu/clear-workshops/

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UP NEXT...

College of Engineering: General Information

Room Use, E-Week, etc.

NEW CLUB STATUS

- Registered Student Organization (RSO)—a student organization registered with the Center for Student Involvement whose purpose is to promote personal and professional growth, cultivate leadership skills and support experimental learning, academic success and persistence through involvement in charitable, service, social, cultural, artistic, recreational, or educational activities consistent with the educational mission of the University.

- University Sponsored Registered Student Organization (USRSO)—an RSO that is sponsored on behalf of an academic or administrative unit by its department head, administrative officer (vice chancellor, vice provost, dean; University Sponsor) and organized for UC Davis students within the unit.

Engineering Sponsored Student Organizations (ESSO) Registration Process

COMING WINTER QUARTER!

- The College of Engineering is excited to announce the implementation of a new student club and organization registration process for the College. The intention of this process is to align organizations under a standard set of principles, and unite all stakeholders under the core values of Equity and Inclusion, Safety and Integrity, and Engagement and Transparency. We aim to incentivize student organizations who demonstrate these values with their decisions and actions.

Dean's Office Shared Areas Available to COE Students Organizations

- Kemper 1002
  - Capacity: 12 @ table
  - 23 extra chairs
  - Projector
  - Projector Screen
  - HDMI Cord
  - Zoom Cart
  - Whiteboard

- Kemper Lobby

- Kemper Courtyard
  - Only available until end of Fall 2022 due to construction

- Bainer South Lawn

PLEASE RETURN FURNITURE TO ROOM AS SHOWN.

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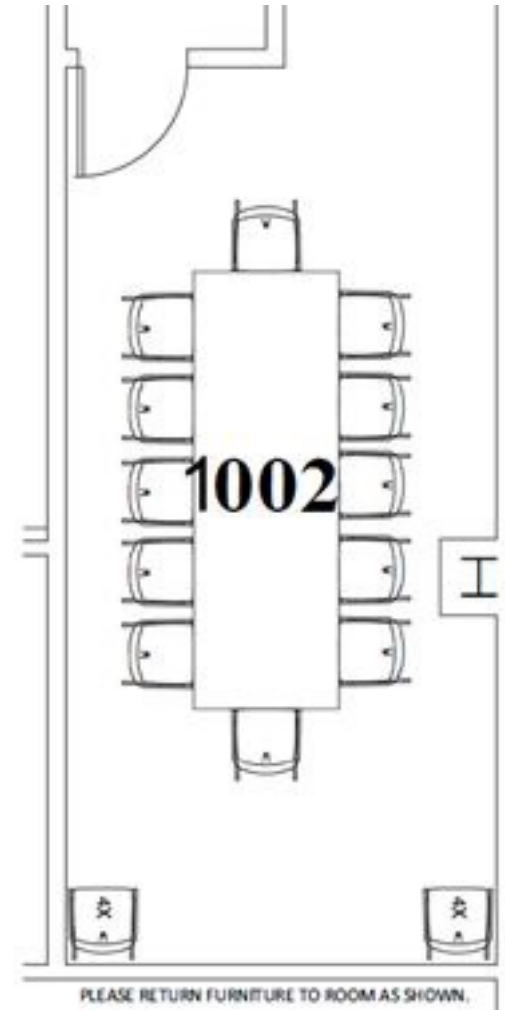
Expectations for Shared Areas

- Shared areas may only be used if reserved ahead of time

- Not all conference rooms within Engineering are open for student use
  - The majority of Dean's Office rooms are for faculty and staff use only
  - Do not ask faculty or staff to reserve restricted spaces on your behalf

- Reserved adequate time before & after your meeting/event for setup and cleanup

- Be professional and respectful of the space

- Keep in mind that the lobby, courtyard, and lawn are public areas and cannot be closed off entirely. You can place "private event" signs to set boundaries.

- For large group events which may generate excessive amounts of waste and/or lead to increased restroom usage, please submit a Custodial Services work order in advance at: http://facilities.ucdavis.edu/custodial-services/contact.html

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Expectations Cont.
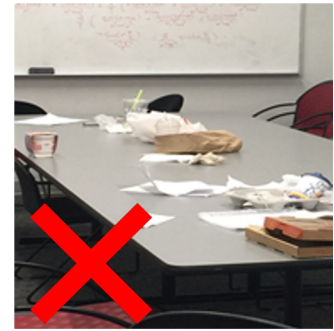
- Leave the space as clean as possible for the next group
  - Wipe down tables with the disinfectant wipes provided in the room
  - Clean and report any spills to the Dean's Office immediately. Your group will be billed if the spill requires professional cleaning or for damage to the space.
- Take food trash to outside dumpsters located in parking lot 44 (across the street from Kemper Hall).
- If you reconfigure the furniture, please rearrange it back to reflect the layout displayed on the wall
- Do NOT allow people to stay in the room after your reservation time has passed
- Failure to comply with policy will result in a loss of privileges to the shared areas
- Campus Ready Guidelines
  - https://campusready.ucdavis.edu/status/event-guidance

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Reservations

- All Engineering Shared Spaces must be reserved in advance by using the central calendaring system known as COWS (Community Web Scheduler) .
- Conference rooms & shared areas displayed on COWS are managed by various departments/units
  - Reservation requests are subject to the policy established by each approving manager
- To request access to COWS, please email Elsa Rojas Perez (erojasperez@ucdavis.edu) with:
  - Name
  - Student Club/Organization
  - UCD Email
  - Phone Number
- Send requests to edit/delete reservations to: coe-scheduling@ucdavis.edu

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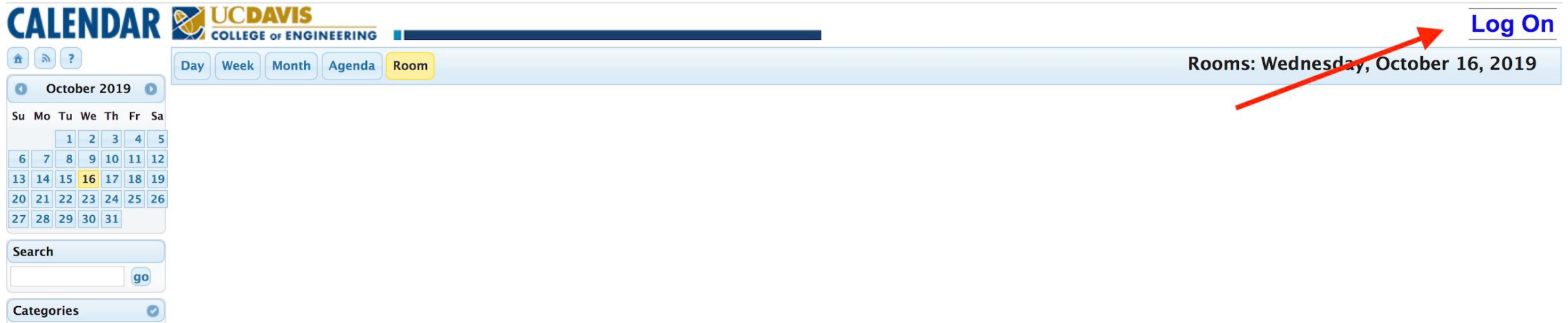
COWS

1. Go to www.cows.ucdavis.edu

2. Select College of Engineering
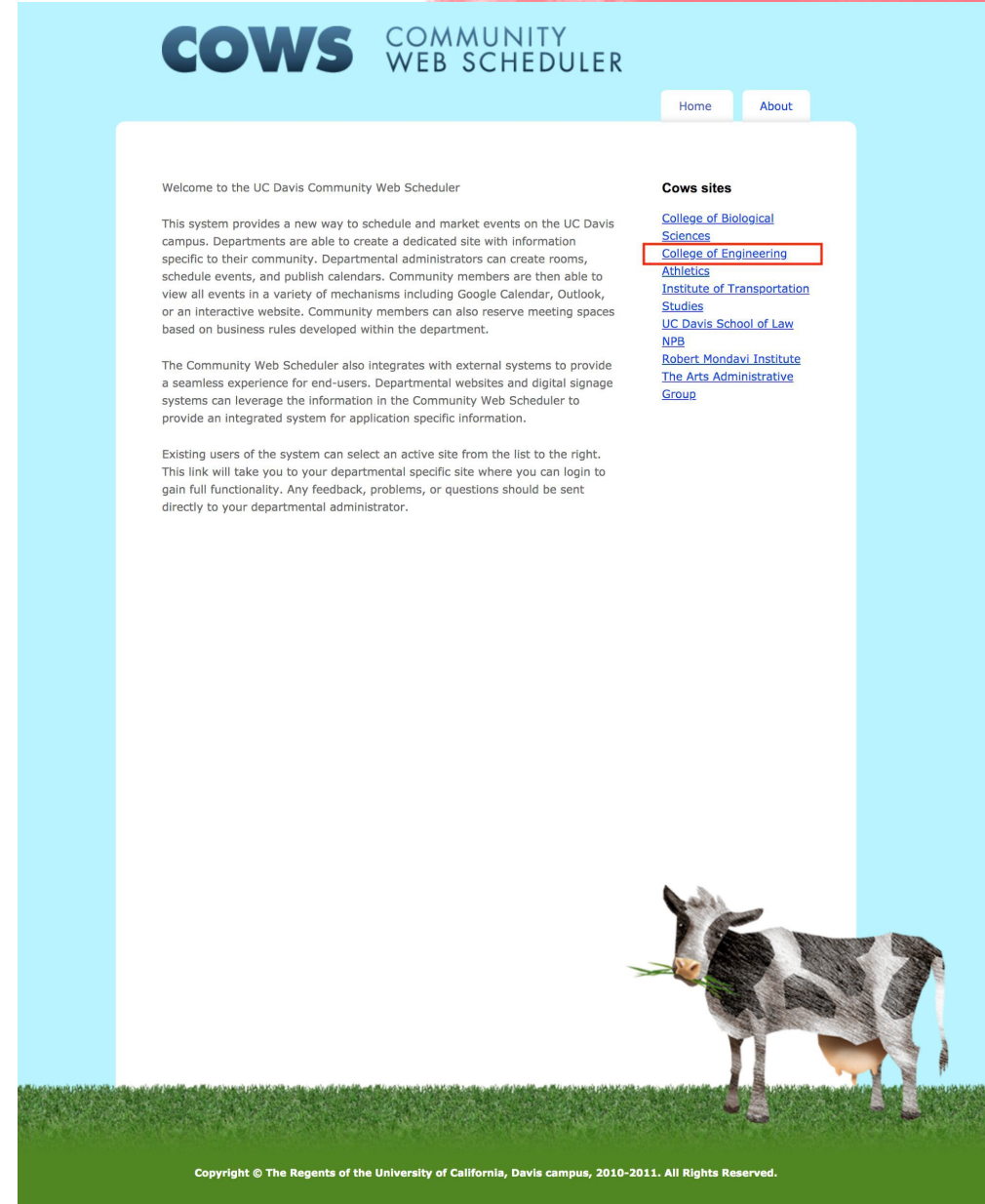
COWS

3. Log in by entering Kerberos login and password

CALENDAR
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Location
- ○ External Location
- ● Reserve a Room
  - Reservation Policy

Room Attributes
- ☐ Business_Hours
- ☐ Capacity
- ☐ Dry_Erase
- ☐ Eduroam
- ☐ Faculty_Present
- ☐ Faculty_Staff_Only
- ☐ Lockbox_for_access
- ☐ No_Food
- ☐ No_Food_or_Beverage
- ☐ Proj_Screen_Only
- ☐ Projector
- ☐ TeleConference
- ☐ Zoom_Room

Buildings
- ☑ Academic Surge
- ☑ Bainer
- ☑ Ghausi
- ☑ Kemper
- ☑ TB 207
- ☑ Watershed

Room Types
- ☑ Classroom
- ☑ Computer_Class_Room
- ☑ Conference_Room
- ☑ EmeritiOffice
- ☑ Equipment
- ☑ Labs
- ☑ Open_Space
- ☑ TA_Room
- ☑ VisitingProfessor
- ☑ VisitingScholar

New Event

Title	
Room	

	reserve	display
Starts	10/16/2019	8:00 AM	8:00 AM
Ends	10/16/2019	9:00 AM	9:00 AM

Contact Name: Natasha Coulter
Contact Email: nbcoulter@ucdavis.edu
Contact Phone: +1 530 752 1905
Description

B *I*

Path:

Event Type

Categories: [none selected]

Display Locations: [none selected]

Event Repeats ☐

Notes for Approver (will not display)

Select Student Clubs

Be sure you are looking at the correct Day and Time here and below

Request   Cancel

◄   **Wed Oct 16 2019**   ►

If the block is colored in it is booked.

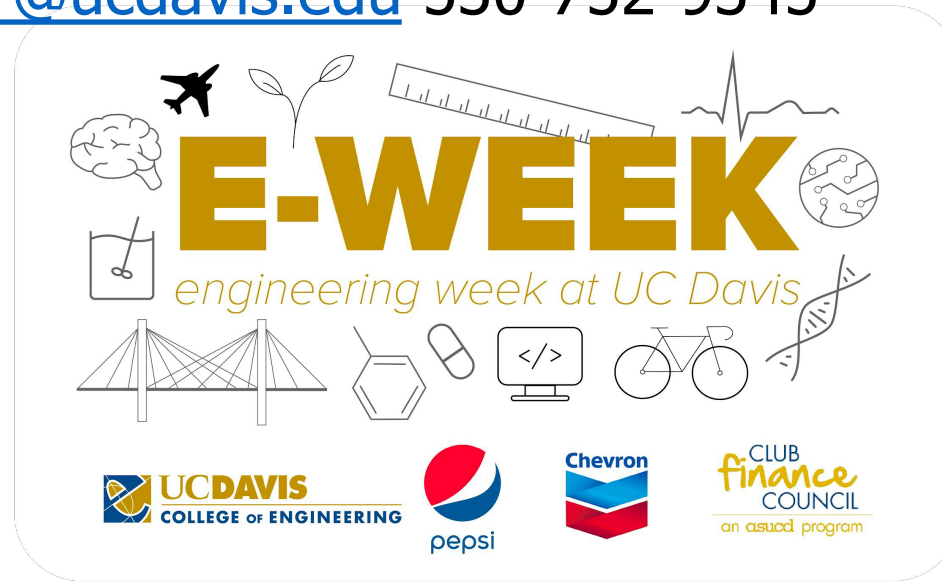|	12 AM	1 AM	2 AM	3 AM	4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM	11 PM
Acad-Surge 2022																								
Acad-Surge 2050																								
Acad-Surge 2215																								
Acad-Surge 2304																								
Bainer 2130																								
Bainer South_Lawn																								
Ghausi Lobby																								
Kemper 1002																								
Kemper 1003																								
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Kemper 55																								
Kemper Courtyard																								
Kemper Lobby																								
TB207 110																								
TB207 112																								
TB207 120																								
Watershed 2203																								

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E-Week   February 19-25, 2023

- Club Point of contact will receive an email about participation
- UC Davis: https://engineering.ucdavis.edu/undergraduates/student-life/engineers-week
- UC: https://engineering.ucdavis.edu/engineering-week
- National: https://discovere.org/engage/engineers-week/
- Lisa Laughter, Interim Director of Advising & Policy
  - llaughter@ucdavis.edu 530-752-9345

News and Social Media

- Campuswide Brand Guidelines (including for social media!)
  - https://communicationsguide.ucdavis.edu/

- Showcase your club!
  - Student Spotlight submission form
  - Club/Team Spotlight submission form
  - Center for Student Involvement Communication Tools
    - https://csi.ucdavis.edu/communication-tools/

- Do something newsworthy? Win an award? Tell us!

- Molly Bechtel, Interim Director of Communications and Culture
  - mmbechtel@ucdavis.edu | 530-400-3213 (call/text)
  - engineeringnews@ucdavis.edu

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UC Davis College of Engineering

ucdavisengineering This week's #FeatureFriday is Macayla Thomas, a mechanical and aerospace engineering double major and a D1 swimmer. Macayla started swimming when she was four years old and immediately loved it. She loves the positive culture and passionate people in the swim community. And, since there is always room to improve, she always has a new goal to strive for. Macayla aims to keep up this attitude when she serves as team captain next year. Balancing all of this with engineering has been tough, but she stays disciplined and makes sure she gets enough sleep to keep her going. She says both swimming and engineering require a lot of work and dedication, and often times she has to

140 likes

MAY 17

Add a comment...   Post

Mechanical & Aerospace Engineering '21

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Cybersecurity Club at UC Davis brings new education, competition opportunities to campus

The Cybersecurity Club at UC Davis celebrates its victory at the Department of Energy's CyberForce competition in December 2018. Photo courtesy of Kevin Rong.

October 8, 2019

By Noah Pflueger-Peters

Contact Information

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Interim Director of Advising & Policy, Engineering Undergraduate Office
College of Engineering
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Elsa Rojas Perez
Associate Dean and Budget Support Assistant
College of Engineering
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Two types of accounts to spend from

- Agency Account
  - Lives in CSI
  - Aggie Life: View balance and make requests
  - RSO president or treasurer should submit an Agency Account Transaction Request through their own student club login
  - You must register annually with CSI to keep access to your Agency Account
  - If you go 2 years without renewing- your gift funds go to CSI
  - You can't request to reimburse yourself- so if president spent, treasurer should request reimbursement

- Gift Account
  - Lives in the College of Engineering
  - Spend out of pocket
  - Complete a reimbursement form and submit to Melanie Clague
  - If you want your gift funds transferred to your Agency Account, there will be an additional agreement to ensure compliance with gift intent and campus policies.

  **When your club receives a gift to your COE gift fund(s), we will alert you with the contact info. we have on file; be sure you provide us with the best person/email to contact.

Fundraising and gift funds
The College of Engineering's Development Team can help you…

1. Connect with hundreds of alumni and corporate partners.
   - We are working with alumni and corporate partners daily. If we know what is going on with your group and what your needs are, we can convey your needs and funding opportunities with those who have interest.

2. Produce professional solicitations that get a response.
   - We can review your brochures, websites, other communications you are using to request gifts.
   - Do you have a give.ucdavis.edu webpage to accept gifts online?
     - If yes- do you want to update the photo or edit the text?
     - If not- we can create one with your input.

3. Track your gift funding.
   - Need a reminder of how much money a donor gave you, or what it was given towards? We can answer those questions for you.

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Fundraising and gift funds
The College of Engineering's Development Team can help you…

4. Steward your donors by providing tax-deductible receipts.
   - All gifts are receipted promptly by Advancement Services and are IRS compliant
   - The department or college will send a thank you note
   - Please also thank your donors directly

5. Ensure compliance with campus and IRS regulations.
   - This is most important- there are campus and federal rules about what is and isn't a "gift." If you are requesting support through a brochure or webpage, this must be reviewed and approved by Advancement services to ensure campus and IRS compliance. Do this early!

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Stewarding your donors

Strong stewardship writing makes your donors feel:
- Appreciated (for their gift)
- Known (their intent is echoed)
- Wise (for choosing to invest in UC Davis)
- Connected (attached to UC Davis)

Therefore, your template follows these sentiments:
- Appreciate them: Say thanks
- Know them: echo their intent
- Reinforce their wisdom: Plug the beneficiary (recipient/department/university)
- Close by strengthening their connection: mention a future interaction, or if not appropriate, reiterate thanks.

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Stewarding your donors

Dear Sally,

Thank you for donating frozen yogurt machines to the UC Davis dining halls. Your generosity is a wonderful way to commemorate your son John's years here, as now all students can enjoy his favorite chocolate-vanilla froyo with sprinkles.

As you know, happy students are successful students. Thank you again for increasing the happiness, and future success, of so many at UC Davis! I hope to share a cone with you in Segundo soon.

Warm regards,
Gunrock

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Alumni Engagement

- How do you currently interact with alumni?
  - Events, conferences, meetings
  - Mentorship and volunteering
- How do you currently communicate with alumni?
  - Alumni database
  - Send member names and email addresses for record-keeping!

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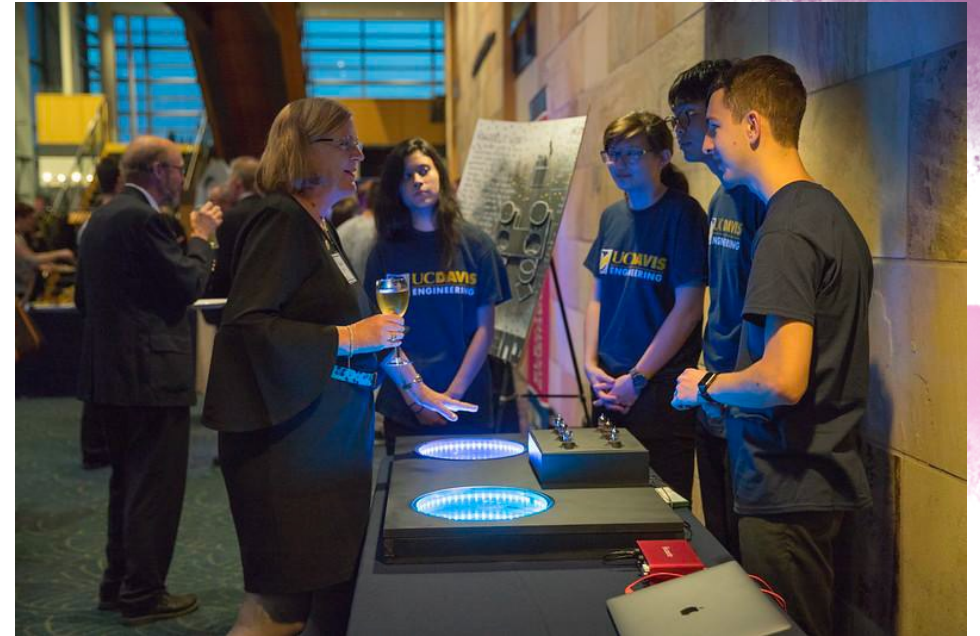
How to prepare to meet with our team

1. Know how much money is in both your agency and your gift funds.
2. Have a budget in place- do you already have enough to accomplish your goals? Do you need to raise more? If so, how much, what will it go towards, etc.?
3. Be prepared to share any brochures, handouts, letters, webpages that are requesting gift funds with us. We will share them with the campus approvers. We suggest you start this approval process at least 4 weeks prior to your intended send/share date with your prospects.
4. Share your list of corporate entities you plan to request funds for with us. We will review it and let you know if we have a contact that we can share it with on your behalf, or if there's a campus proposal that conflicts with your request. We may also have suggestions on other industry partners you should approach.

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Ready to start raising money?
or
Questions about interacting with Alumni?
Email:
engrdev@ucdavis.edu
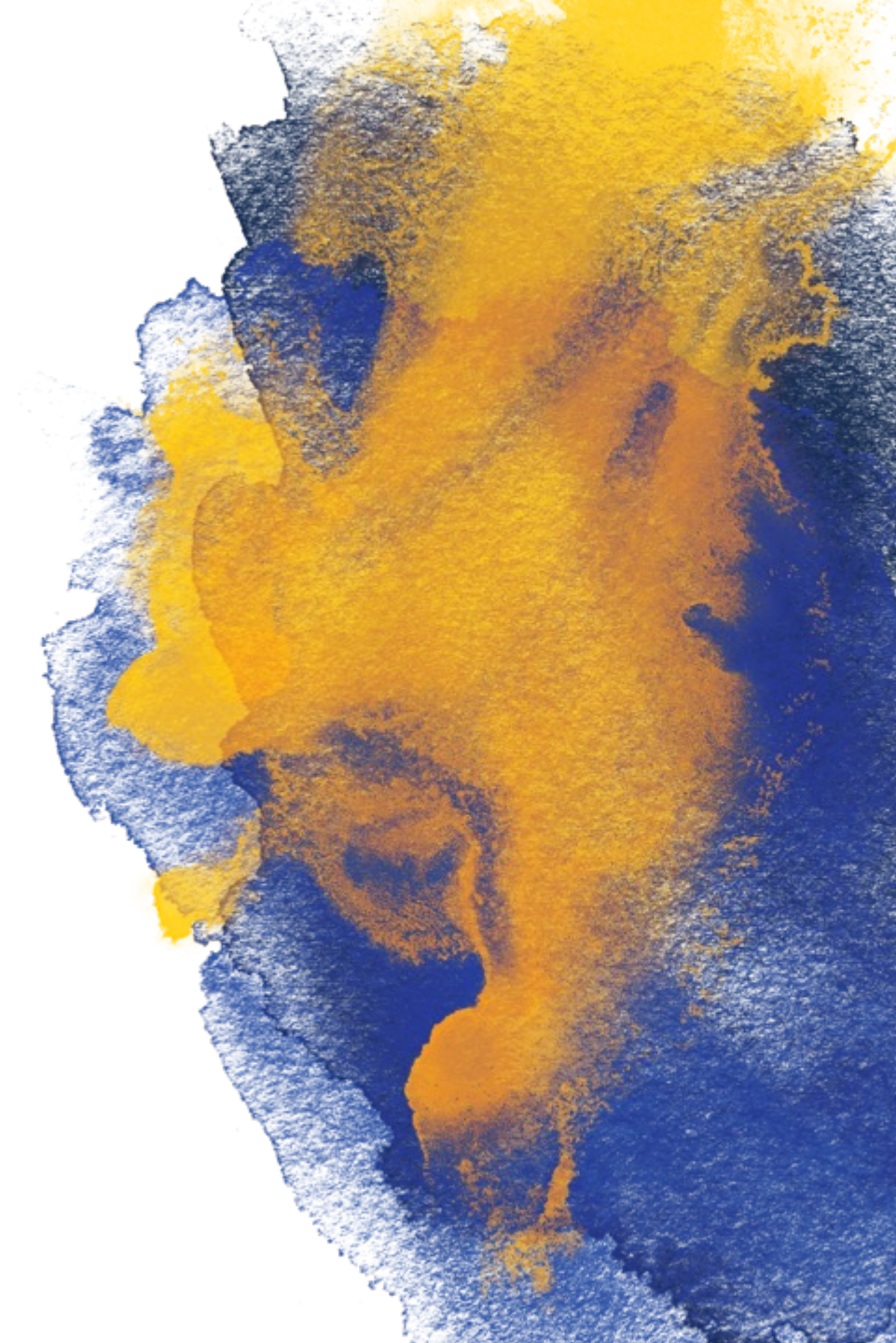
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College of Engineering Gift Account
Two Ways to Spend

#1. Funds can be transferred to Agency accounts
- Budget is approved by faculty advisor and department account manager
- Student organization submits *agency account transaction request form* into AggieLife
  - Enter department approver information (for Dean's Office, Melanie Clague mclague@ucdavis.edu)
  - Enter funding amount requested
- EIN is required
- Once form is submitted into AggieLife with appropriate documents, department approver enters funding details
- Routes to Business Services for review and approval

#2. Funds can be used for reimbursement of out-of-pocket club expenses
- Complete required forms
- Provide required receipts
- Submit forms to Account Manager for further processing
  - Processed via Pre Purchasing System (OPP)

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Reimbursements

Before purchasing any travel, items or services, it is important to familiarize yourself with applicable policies and regulations.

- Visit http://travel.ucdavis.edu/ for information regarding UCD policies.

- If receiving funds from your Gift Account:
  - Understand dept. practice for processing requests and expenses/reimbursements
  - Make sure the expense/purchase is reimbursable – "When in doubt, always ask!"

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Reimbursements

- Keep all valid receipts
  - A valid receipt contains amount, date, place of purchase, identification of what was purchased, and proof of payment.
  - Must display transaction information
    - Last four #s of credit card
    - Name of cardholder/traveler

- Reimbursement forms need to include as much information as possible
  - Current contact information-Name, email, phone and mailing address
  - Business purpose needs to be detailed (name of conference, dates and reason attended) not just "attended conference".
  - Make sure to sign your forms

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Reimbursements

- Keep in mind:
  - Reimbursements take time, make sure you plan for it

- Submit expense reimbursement report within 21 days of post-travel

- **All university paid travel, regardless of payment method, is subject to IRS tax laws and UC policies**.
  - Failure to follow university policies can result in additional taxable income on your paycheck and/or out-of-pocket expenses not being reimbursed.

Travel Expenses
Before Travel

- All travel expenses paid with personal funds will be reimbursed after the trip – Please plan accordingly

- When possible, students should book airfare through Connexuss
  - If airfare is booked using a personal credit card, it will be reimbursed after the trip

- **DO NOT** use gift cards, vouchers or personal credits to pay for airfare or travel expenses

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Travel Expenses

- **Personal Car:** Provide any personal automobile-related expenses (e.g. mileage, bridge tolls and parking).

- **Airfare:** Present a copy of the itinerary or your boarding pass which includes the dollar amount paid, and confirmation the ticket was paid.
  - Purchase tickets classified as economy/coach class ONLY

- **Lodging:** The receipt must be in your name and itemized.
  - While it may be convenient for one person to make multiple reservations, make sure that when you pay, the receipt lists you as the hotel guest.

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Travel Expenses

After Trip

- **Ground Transportation:** Save receipts.
    - If you receive a handwritten receipts, be sure the date is filled in.

- **Registration:** Provide a receipt, which includes the amount paid and confirmation of payment made/funds received.

- **Meals & Incidentals:** UC reimburses actual costs of meals, up to a maximum of $79 per day (amount subject to change).

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Travel Expenses

- **DO NOT PAY FOR OTHER TRAVELERS:**
    - Each traveler must pay for their own travel expenses (meals, travel, lodging, etc.) and submit their own receipts with the request for travel reimbursement.

- UC Travel Policies and Procedures: http://travel.ucdavis.edu

Conference Registration Options

- Out-of-Pocket:
  - Reimbursement is processed post-trip even if the conference is virtual
  - Submit expense form
    - Include conference details: Conference Flyer with Name, Dates, Locations
    - Provide proof of payment
  - Work with Department Account Manager or COE Shared Services

- Bulk Registrations:
  - Processed via Pre-Purchasing System – OPP
  - Student clubs/organizations will need to work with vendor to obtain invoice
  - Work with Department Account Manager for guidance

Reimbursement/Expense Forms:
Which form should I use?

All forms are available online:
https://ucdavis.box.com/s/wjq9ufm8unyjgknmxnluk3wfx1l9qy9b

Reimbursement Request Form

- Used for out of pocket supply expenses (e.g. t-shirts, swag, etc.)
- Max of $499.99 reimbursement
- Equipment including computers is not reimbursable
- Printing expenses will <u>not</u> be reimbursed
  - Students are encouraged to use Reprographics for printing

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Request for Travel Reimbursement Form

- Used for travel reimbursement post-trip
- Out of pocket costs for Airfare, Lodging, Conference Registration, Ground Transportation, and Incidentals
- A notation is required for hosted lodging
- Students need to sign under the non-employee signature field
- Conference Flyer is Required

Request for Payment Entertainment Expense

- Used for out of pocket entertainment expenses for student club hosted events (e.g. meals, refreshments, etc.)
- Include the list of attendees
- Purpose of the event must be clearly stated
- Agenda or meeting invitation

Contact Information

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Questions?

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