



Cultural Arts & Diversity Resource Center Virtual Handbook

The Official Guide to being on the CAD Board of Directors, a member of CAD leadership, and/or part of the office staff. This book includes the CAD bylaws, resources, contacts, tips & tricks, and just about everything you need to know about working for Cultural Arts & Diversity.



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Robert's Rules of Order

Robert's Rules of Order, which is also widely known as parliamentary procedure, was developed to ensure that meetings are fair, efficient, democratic and orderly. A skilled chairperson allows all members to voice their opinions in an orderly manner so that everyone in the meeting can hear and be heard. CADrc uses parliamentary procedure during its meetings in order to work fairly and effectively. The CADrc Chairperson will create an agenda and guide the meeting (the Vice Chair will fulfill this responsibility if the Chair is out sick, etc.).

Types of Motions:

1. Main Motion: Introduce a new item
2. Subsidiary Motion: Change or affect how to handle a main motion (vote on this before main motion)
3. Privileged Motion: Urgent or important matter unrelated to pending business
4. Incidental Motion: Questions procedure of other motions (must consider before the other motion)
5. Motion to Table: Kills a motion
6. Motion to Postpone: Delays a vote (can reopen debate on the main motion)

Every Motion Has 6 Steps:

1. Motion: A member rises or raises a hand to signal the chairperson.
2. Second: Another member seconds the motion.
3. Restate motion: The chairperson restates the motion.
4. Debate: The members debate the motion.
5. Vote: The chairperson restates the motion, and then first asks for affirmative votes, and then negative votes.
6. Announce the vote: The chairperson announces the result of the vote and any instructions.

TIP! If the board is in obvious agreement, the chairperson may save time by stating, "If there is no objection, we will adopt the motion to..." Then wait for any objections. Then say, "Hearing no objections, (state the motion) is adopted." And then state any instructions. If a member objects, first ask for debate, then vote and then announce the vote.

Requesting Points of Something

Certain situations need attention during the meeting, but they don't require a motion, second, debate or voting. It's permissible to state a point during a meeting where the chairperson needs to handle a situation right away. Board members can declare a Point of Order, Point of Information, Point of Inquiry or Point of Personal Privilege.

Point of Order: Draws attention to a breach of rules, improper procedure, breaching of established practices, etc.

Point of Information: A member may need to bring up an additional point or additional information (in the form of a non-debatable statement) so that the other members can make fully informed votes.

Point of Inquiry: A member may use a *point of inquiry* to ask for clarification in a report to make better voting decisions.

Point of Personal Privilege: A member may use a *point of personal privilege* to address the physical comfort of the setting such as temperature or noise. Members may also use it to address the accuracy of published reports or the accuracy of a member's conduct.

Tips and Reminders for Chairpersons

- Follow the agenda to keep the group moving toward its goals.
- Let the group do its own work; don't over-command.
- Control the flow of the meeting by recognizing members who ask to speak.
- Let all members speak once before allowing anyone to speak a second time.
- When discussions get off-track, gently guide the group back to the agenda.
- Model courtesy and respect, and insist that others do the same.
- Help to develop the board's skills in parliamentary procedure by properly using motions and points of order.
- Give each speaker your undivided attention.
- Keep an emotional pulse on the discussions.
- Allow a consensus to have the final authority of th

Robert's Rules of Order Cheat Sheet

Action	What to Say	Can interrupt speaker?	Need a Second?	Can be Debated?	Can be Amended?	Votes Needed
Introduce main motion	"I move to..."	No	Yes	Yes	Yes	Majority
Amend a motion	"I move to amend the motion by..." (add or strike words or both)	No	Yes	Yes	Yes	Majority
Move item to committee	"I move that we refer the matter to committee."	No	Yes	Yes	No	Majority
Postpone item	"I move to postpone the matter until..."	No	Yes	Yes	No	Majority
End debate	"I move the previous question."	No	Yes	Yes	No	Majority
Object to procedure	"Point of order."	Yes	No	No	No	Chair decision
Recess the meeting	"I move that we recess until..."	No	Yes	No	No	Majority
Adjourn the meeting	"I move to adjourn the meeting."	No	Yes	No	No	Majority
Request information	"Point of information."	Yes	No	No	No	No vote
Overrule the chair's ruling	"I move to overrule the chair's ruling."	Yes	Yes	Yes	No	Majority
Extend the allotted time	"I move to extend the time by ___ minutes."	No	Yes	No	Yes	2/3
Enforce the rules or point out incorrect procedure	"Point of order."	Yes	No	No	No	No vote
Table a Motion	"I move to table..."	No	Yes	No	No	Majority

Verify voice vote with count	"I call for a division."	No	No	No	No	No vote
Object to considering some undiplomatic matter	"I object to consideration of this matter..."	Yes	No	No	No	2/3
Take up a previously tabled item	"I move to take from the table..."	No	Yes	No	No	Majority
*Reconsider something already disposed of	"I move to reconsider our action to..."	Yes	Yes	Yes	Yes	Majority
Consider something out of its scheduled order	"I move to suspend the rules and consider..."	No	Yes	No	No	2/3
Close the meeting for executive session	"I move to go into executive session."	No	Yes	No	No	Majority
Personal preference-noise, room temperature, distractions	"Point of privilege"	Yes	No	No	No	No vote

Governing Document Of The University Of California, Santa Cruz Cultural Arts and Diversity

Preamble:

We, the undergraduate students of the University of California Santa Cruz (UCSC), have observed and/or have experienced the following:

- discrimination, incidents of hate and prejudice, rejection, institutional racism and oppression, sexism, homophobia, and xenophobia at UCSC;
- a lack of support for actively telling the stories and expressing the unique experiences of marginalized communities;
- an inability of the Theatre Arts Departments to equally represent the various cultures of the UCSC community through public performances and classroom instruction;
- a lack of funding for the traditional outreach and retention organizations that worked to ensure a vibrant multicultural community at UCSC;
- a lack of current performance facilities, and functioning modern equipment to keep up with the growing needs of student cultural arts groups; and
- decreased support for organizations that provide cultural awareness and diversity, build collaborative partnerships and community outreach, enhance retention and recruitment efforts, and provide opportunities for leadership and educational development
- UC lacks an authentic appreciation of various cultures and a commitment to diversity that goes beyond rhetoric
- UC and state government have been systematically dismantling resources that serve to uplift, empower, support, and educate underrepresented communities
- UC has been continuously moving towards a capitalist model that prizes fiscal concerns over providing a rich, diverse curriculum that provides students with the vital resources necessary to become productive global citizens positively shaping their world.

We believe:

- UC should serve to open minds, promote unity and build solidarity across manufactured divisions (such as race, nationality, class, gender, and sexual orientation), and support all people in their struggles for liberation and self-representation.
- UC should make a more proactive effort to continue to provide resources that build meaningful connections with community organizations, members and leaders for an enriching educational experience
- UC should provide opportunities for underrepresented communities to have resources visible through Arts, etc.
- That the above decreases the quality of education, graduation rates from the University of California, and the commitment to diversity, activism and improving society while inhibiting access;
- that UCSC is a microcosm of our families, local, and global communities;
- that all UC's must reflect the demographics of California in order to fulfill the University of California's Mission;
- that there is healing and transformative power in being exposed to and understanding stories from various cultures;
- that through performance, art, solidarity and unity, the possibilities become powerful beyond measure

Thus, as students, artists, actors, publishers, producers, poets, musicians, directors, technicians, advocates, mothers, fathers, family members, friends, leaders, and financial contributors to the University of California, we are determined to establish cultural arts and diversity through:

- Reaffirming our dedication to expressing the struggles and successes in the experiences of our communities through cultural arts.
- Preserving, expanding and enhancing the resources available to inspire and promote diverse student expression.
- Establishing safe spaces that encourage student growth and success in the university environment.
- Promoting, increasing, and improving cross-cultural understanding at UCSC;
- Promoting, increasing, and improving graduation, outreach, retention, and diversity rates at UCSC.
- Striving for and promoting artistic expression, understanding, unity and solidarity as a means of liberation.
- Creating resources and opportunities that serve to promote under represented communities through the arts.

And for these ends:

- We will continuously strive for artistic expression, understanding, unity and solidarity as a means of liberating ourselves, our communities and the voices within them.

We have resolved to accomplish these aim:

- Through providing a supportive venue for student expression and hereby establishing the Resource Center for Cultural Arts and Diversity at the University of California Santa Cruz; here in after referred to as CAD.

Article I: Mission

Section 1.01 Mission

The mission of this resource center is to:

- (a) Produce student initiated theater and visual arts programs that will inspire students to accept, articulate and protect diversity.
- (b) Provide a professional space for reflecting and promoting the stories of communities of color through performing arts.
- (c) Train members in skill to: run space, build career, operate equipment and set for performing arts and lecturers.
- (d) Provide an administrative and programming space from which student-initiated outreach, retention and co-curricular programs can be conducted.
- (e) Educate the public by producing programs, providing access to information technology, documentation, audio-visual materials, artwork, and oral tradition.
- (f) Connect UCSC to the greater community by providing professionals, speakers, bridging relations with cultural community centers, outreach to under resourced and underrepresented communities to create a higher education pipeline.
- (g) Make resources visible to students, community and staff.
- (h) Provide space for student governance, and student employment.
- (i) Build and foster community.

Section 1.02 Vision

The vision of this resource center is to:

- (a) Provide a compulsory fee of \$5.25 per quarter per student beginning Fall 2011 to

- provide funding for the Cultural Arts and Diversity program to support student organization's cultural art performances, campus-wide cultural programs, and professional technical equipment to revamp the Stevenson Event Center;
- (b) Let multiple student focus groups assess student needs and develop goals for student cultural programs on campus;
 - (c) Bring nationally known cultural arts performers and speakers to UCSC and foster the growth of student-directed cultural organizations such as UCSC's award-winning Rainbow Theater and African American Theater Arts Troupe, as well as student-directed cultural arts performances.
 - (d) Bring dynamic and diverse performances to the campus:
 - (i) To increase campus-wide exposure and awareness of diverse cultures through student productions and nationally known art groups. These productions are fundamental to creating an educational experience, so they must be protected from budget cuts. Events will include free performances of:
 - Nationally known speakers and performers
 - Student cultural arts productions
 - (e) The fund will support culturally competent and experienced staff to provide advising, instruction and mentorship.

Section 1.03 Reasons for Cultural Arts and Diversity existence

Cultural Arts and Diversity exists to:

- (a) Produce traditional and nontraditional academic and co-curricular activities.
- (b) Hold the university accountable for its missions, goals, regulations and guidelines.
- (c) Get the University of California Santa Cruz to improve the reflection of California's demographics within UCSC.
- (d) Encourage students to engage in their educational and creative processes to empower themselves as students.
- (e) Aid students in getting as much as possible out of their education.
- (f) Build and mentor University of California, Santa Cruz's future leaders.

Section 1.04 Cultural Arts and Diversity Resource Center's Goal

The official goal of Cultural Arts and Diversity Resource Center is to:

- Build and foster community
- Provide acceptance and inspiration through art
- Protect cultural arts and diversity
- Mentor and inspire the community
- Make diversity more apparent on campus
- Legitimize performance through improvement of Stevenson Event Center
- Impact Community

Article II. Membership

The membership of Cultural Arts and Diversity shall consist of the undergraduate students affiliated with Rainbow Theater, African American Theater Arts Troupe, and those under annual contracts for partnership. The members have the right to make recommendations to the Cultural Arts and Diversity Board of Directors.

Article III. Advisory Council

Section 3.01 Powers

The Cultural Arts and Diversity Advisory Council consists of CAD alumni, staff and faculty who shall provide advice, guidance, and professional mentorship regarding organizational growth to the CAD Board of Directors.

Section 3.02 Responsibilities

The responsibilities of the Cultural Arts and Diversity Advisory Council shall consist of:

- (a) Attending annual meetings as scheduled by the Board;
- (b) Providing advice on financial and organizational growth and stability;
- (c) Demonstrating experience, commitment, and respect for cultural arts;

Section 3.03 Composition

- (a) CAD Board of Director Chair(s)
- (b) 2 Faculty
- (c) 1 Staff
- (d) 1 Alumni
- (e) Participants

Section 3.04 Nomination

- (a) Members of the CAD Advisory Council shall be nominated by the CAD Board of Directors
- (b) A letter of interest shall be submitted to the nominated candidate one week after nomination proposal
- (c) The nominated candidate shall be appointed upon the vote of the Board

Article IV. Board of Directors Cultural Arts and Diversity Members

Section 4.01 Powers

The Board of Directors shall:

- (a) Advocate for a student agenda that outreaches to and retains underrepresented communities
- (b) Ensure the Cultural Arts and Diversity mission is carried out
- (c) Advise and recommend policies on cultural arts and diversity to the University of California

Section 4.02 Responsibilities

The Board of Directors will:

- (a) Act as a liaison/bridge to under represented and/or under resourced communities
- (b) Research, contact and establish collaborative working relationships with target communities
- (c) Maintain a current understanding of policies and challenges that impact CAD's mission
- (d) Inform the cultural arts and diversity community about CAD resources
- (e) Balance, approve, amend, or reject budgets and expenditures, including all paid positions
- (f) Serve as an inspiring model of diversity, integrity, and service
- (g) Be accountable to and implement Board decisions
- (h) Ensure training, support, and evaluations of student staff
- (i) Ensure the production of workshops for use of space and equipment
- (j) Ensure documentation of meetings and all decisions, and make these public
- (k) Evaluate all programs to ensure there is benefit to students
- (l) Attend and volunteer for Measure 49 programs
- (m) Attend all board orientations, retreats, and meetings
- (n) Work to maintain a continuity of diverse representation in leadership
- (o) Ensure continuity of diverse representation in leadership

Section 4.03 Composition

Composition of the Cultural Arts and Diversity Board of Directors shall consist of:

- (a) Chair
- (b) Vice Chair
- (c) At Least Two Representatives of Rainbow Theater
- (d) At Least Two Representatives of African American Theater Arts Troupe (AATAT)
- (e) At Least One Representative of Stevenson College

Section 4.04 Alternates

- (a) Alternates are selected through the election of the Advisory Council
- (b) Are kept up to date on a quarterly basis by the Director of Cultural Arts and Diversity
- (c) Attend annual orientation and social events as invited

Section 4.04 Positions and Responsibilities

(A) Chair:

1. Calls the meetings and emergency meetings of the Board of Directors
2. Has weekly meetings with CAD advisors
3. Seeks out events for possible collaborations or sponsorship
4. Facilitates Board meetings
5. Represents Cultural Arts and Diversity at meetings, events, public, media, etc
6. Coordinates efforts to recruit and interact with board members
7. Works with Vice Chair to create agendas for meetings

(B) Vice Chair

1. Facilitates meetings when Chair cannot do so
2. Assists Chair in preparing for meetings
3. Supervise of staff, interns and volunteers for CAD and sponsored events

(C) Secretary

1. Ensures that minutes are taken with a clear account of decisions and hard copies of paperwork distributed at meetings
2. Receives Board member contact information and submits to the CAD office for Board files
3. Keeps record of and reports on attendance of all Board of Directors
4. Meet with chair & vice chair
5. Maintain paperwork

(D) Stevenson Liaison

1. Have a connection and contact information with the following organizations: Multicultural Advisory Committee, Stevenson Student Council, and Cowell Student Council
2. Relay information, updates, suggestions and questions between organizations and the Board of Directors
3. Create collaborative events with organizations to reach more students in order to create an understanding of diversity

(E) Ambassador for Ethnic Organizations

1. Have a connection and contact information with (but not limited to) the following organizations:
 - a. Indian Student Alliance
 - b. Filipino Student Association
 - c. Los Mejicas
2. Relay information, updates, suggestions and questions between organizations and the Board of Directors
3. Create collaborative events with organizations to reach more students in order to

create and understanding of diversity

(F) Historian

1. Summarize past events in Cultural Arts and Diversity history
2. Archive pictures, testimonials from clients or audience members, newspaper articles and other published news about Cultural Arts and Diversity
3. Maintaining booklet/ binder of past, current, and upcoming events
4. Maintain and document feedback on various presentations and surveys held throughout the year
5. Responsible for assisting media with information of programs and events
6. Update the Cultural Arts and Diversity website accordingly

(G) Treasurer

1. Oversee the transactions of the organization
2. Audit often
3. Have a record of all proposals approved and not approved for archive purposes
4. Understand and translate each budget in proposal presented

Section 4.05 Qualifications for Board of Directors

Cultural Arts and Diversity Board Members must:

- a) Be an active member of the registered student organizations: Rainbow Theater or African American Theater Arts Troupe
- b) Be a currently registered student and have completed at least one quarter at UCSC;
 - I) Exceptions can be made for first years and transfer students after a thorough review by the CAD Board
- c) Be in good academic standing
 - I) The BOD can make exceptions if the candidate submits a personal statement and their academic advisor writes a letter of support with recommendations for the candidate to succeed academically.
 - II) In addition, the BOD will evaluate quarterly to monitor academic progress.

Section 4.06 Process for Appointments

Board appointments shall be made as follows:

- A) Rainbow Theater, AATAT, Stevenson Council positions shall be nominated and voted on according to the governing processes of each respective organization;
- B) The At-Large Representative of student cultural arts Organizations shall be appointed through the process of the Student Committee on Committees, using qualifications provided by CAD;
- C) The CAD Staff representative shall be appointed by the CAD Director;
- D) The Ex-Officio CAD Alumni shall be appointed by nomination and a vote by the Board

Section 4.07 Term Limits of Board Positions

Board members shall be allowed to act as voting members for a maximum of two years. Board members may run for a second reelection and occupy voting positions for more than two years if:

- i) A board member is currently holding a position as Vice Chair and intends to hold the position of Chair
- ii) A board member was, in their first year as a voting member, an alternate for a position and filled in for a member of the board

Section 4.08 Process for Removal

Board members may be removed if they are negatively impacting the work of the Board and CAD by not fulfilling their responsibilities or not abiding by the Board's governing documents. The process shall be:

- A) Discussion at a regular Board meeting and a vote that the situation warrants a formal review;
- B) Notification of the member via email of the issues raised and the date of the meeting for their review. (Notice will be sent within 12 hours of the Board discussion to the email on file at the CAD office);
- C) A special Board meeting may be called or the review may be held at the next regular meeting, depending on the Board's preference;
- D) The meeting will be held at a time that allows the member a minimum of 48 hours to receive the notice and at a day and time the Board meets regularly;
- E) At the meeting, the issues will be stated using specific examples and in no more than 10 minutes. The member has 10 minutes to consider the issues and 10 minutes to respond, followed by 30 minutes for questions and answers, which will last no longer than one hour.
- F) The Board will vote on the member's removal from the Board, which will require a 2/3s majority. The member will step out of the room during the Board's discussion and vote.

Section 4.09 Meetings

Regular meetings of the Board will be scheduled by the Chair based on a review of Board member schedules and allowing a minimum of 7 days notice to all Board members, via email to the emails given to the Secretary and on file at the CAD office.

Emergency meetings of the Board may be called by consensus of the Chair, Vice Chair, and CAD staff representative and allowing a minimum of a 24 hour notice to all Board members, via email to the emails given to the Secretary and on file at the CAD office.

Section 4.10 Voting Rights

Voting rights are only given to members of the Board

- (A) Board members may vote after attending a Board members orientation and being able to articulate the full function of CAD through successfully completing an oral questionnaire.
- (B) Board members lose voting rights after missing two consecutive meetings without reasons that are accepted by the Board.
- (C) Alternates can vote as long as they meet the following criteria:
 - 1) Nomination and selection by the Board
 - 2) Attendance at a Board orientation
 - 3) Maintain a current knowledge of Board affairs

Section 4.11 Decision Making Process

The Board of Directors shall strive for consensus in its decisions. If consensus cannot be reached, the following process will be followed:

- A) One Board member must make a motion and a different Board member must second for a motion to be voted on;
- B) The motion will be decided by a simple majority vote for all decisions, except amendments to governing documents and motions to amend any changes to the membership of the Board.

Article V. Practicing Principles of Unity

The Board of Directors are required to continually practice and model the Principles of

Unity, shared from Engaging Education's constitution, to ensure a safe and working environment within the Board Of Directors meeting space and the CAD Center. The principles are as follows:

- Be willing to constructively challenge, check and grow
- Be Honest
- Be invested and take ownership
- Actively work to build trust
- Avoid judging
- Respect yourself and each other
- Act out of LOVE
- Be patient with yourself and others
- Be forgiving
- Be solution based

Article VI. Amendments

Section 6.1 Amending Process

Amendments to this governing document may be made if they are in agreement with the language of Measure 49 and the primary Mission of CAD. Amendments may be made through the following process:

- A) Proposal for the amendment by a Board member at a regular Board meeting.
- B) Notification of all Board members of the proposal, to be discussed and voted on at the next regular Board meeting.
- C) Have Advisory Council review proposal for the amendment
- D) Discussion and vote on the amendment by the Board, requiring a $\frac{3}{4}$ majority vote.

Section 6.2 Regular Review and Revisions

- (a) The CAD Bylaws must be reviewed during Winter Quarter of each year in a midyear review to ensure that operations have been in compliance with our greater mission.
- (b) The CAD Bylaws must be reviewed and resubmitted to SOMeCA at the end of every academic year to be approved and updated.

Measure Language

Measure 49: Cultural Arts and Diversity Fee

Ballot Type

Establishing a New Fee

Ballot Author

Cultural Arts and Diversity Student Interns

QUESTION:

Shall undergraduate students provide funding to the Cultural Arts and Diversity Center for the support of student-directed cultural arts performance organizations and campus-wide cultural programs by establishing a new compulsory fee of \$5.25 per quarter per student beginning Fall 2011?

SUMMARY POINTS

- New undergraduate compulsory fee of \$5.25 per quarter, excluding summer session.
- Fee will begin Fall Quarter 2011 and is a permanent fee with no ending date.
- Fee will be governed by a Board of Directors comprised of a student-majority.
- Fee will generate approximately \$234,486* in 2011-2012.
- This fee includes a 33% Return-to-Aid component in which 33% of all fees collected will automatically go to financial aid to help those students who are on financial aid cover the expense of the fee. This will be approximately \$77,380 per year.
- Fee is sponsored for undergraduates on the ballot by petition signed by 10% of registered undergraduate students.
- The Student Fee Advisory Committee (SFAC) endorses this measure because it supports a unique program focused on direct services to students and helps to retain a diverse, cultural and artistic program on the UCSC campus.
- Student consultation: Students led multiple focus groups to assess student needs and develop goals for student cultural programs on campus.

*Three quarter enrollment estimate based on the average 2009-2010 quarterly enrollment of 14,888

BALLOT STATEMENT

This student-governed fund will bring nationally known cultural arts performers and speakers to UCSC and will foster the growth of student-directed cultural organizations such as UCSC's award-winning Rainbow Theater and the African American Theater Arts Troupe, as well as student-directed cultural arts performances (e.g. Grupo Folklorico Los Mejicas Spring Concert, Pilipino Cultural Celebration, Indian Student Organization Cultural Show). These student organizations and performances have existed for 10-30 years, are under-funded, and are not housed within the Theater Arts Department.

EDUCATIONAL BENEFIT

1. Dynamic and diverse performances for the campus: The fund will increase campus-wide exposure to and awareness of diverse cultures through student productions and nationally known arts groups. These productions are critical to a well-rounded educational experience and must be protected from budget cuts. Events will include free performances of:

- Nationally known speakers and performers
- Student cultural arts productions

2. Cultural Arts and Technology Training:

UCSC undergraduate students will learn about cultural arts through workshops and in a community atmosphere that respects art from a diversity of perspectives. Students will also receive hands-on training and employment in the technical aspects of productions, including stage management, sound, lighting, et cetera; unique training currently limited to theater arts majors. The fund will support culturally competent and experienced staff to provide advising, instruction, and mentorship.

3. State-of-the-Art Equipment

UCSC's current performance facilities have not kept up with the growing needs of student cultural arts groups. Cultural Arts and Diversity students and staff have formed a partnership with Stevenson College to enhance performances at the existing Stevenson Event Center, if this measure is passed. The partnership will coordinate the purchase and maintenance of state of the art equipment to support performances at a professional level.

GOVERNANCE

Funds from the measure and inventory will be governed by a student-majority Board of Directors so as to maintain accessibility and accountability to student needs. Members of the board will include: 2 appointed representatives of Rainbow Theater, 2 from the African American Theater Arts Troupe; 1 representative of Stevenson College Student Council and 1 at-large representative of student cultural arts organizations appointed through the Student Committee on Committees; 1 CAD staff; and 1 ex-officio CAD alumni.

More information about the Cultural Arts and Diversity Center can be found at:

<http://cadrc.ucsc.edu/>.

Endorsements:

Student Media Council

TWANAS

CAD History & Purpose

The Cultural Arts and Diversity Resource Center serves a diverse community of cultures at UCSC for cultural enrichment and educational experiences through our fall program, Rainbow Theatre Troupe; our winter program, the African American Theatre Arts Troupe (AATAT); and our year-round sponsorship of student and professional productions. Both Rainbow and AATAT sponsor student and professional productions, and cast actors, technicians, singers, dancers, and poets to fill all theatrical roles with students of all majors. These troupes address contemporary and historical socio-political issues relevant to people of color by performing shows written by, about, and for people of color, centralizing them in theatre. CADrc strives to retain a diverse student population through opportunities for cultural experiences via performances, leadership, and activism. The troupes then take this on-campus community and extend it to high schools in Los Angeles, the Bay area, and Monterey Bay via quarterly outreach programs. We house two student theatre troupes, three outreach teams, four academic courses, and year-round lectures, workshops, and professional productions. Our goal is to empower people by enhancing cross-cultural understanding and solidarity.

Our Mission

The Cultural Arts and Diversity (CAD) Resource Center strives to enhance the cultural climate of the University of California, Santa Cruz, and its surrounding communities by first, celebrating diversity. We work to foster the spirit of unity between cultures by providing outlets for the creative talents of the members of various cultural backgrounds through a series of lectures, presentations, workshops and productions. By gaining access to resources and services that support these endeavors, we strive to provide cultural awareness and diversity, build collaborative partnerships and community outreach, enhance retention and recruitment efforts, and provide opportunities for leadership and educational development. Our resource center, among many other things, houses two student-based theatrical organizations, four academic courses, professional quality student productions, a series of lectures and workshops, two outreach teams and a series of professional productions. These services are available year around, working to provide our community with art, culture and most of all, a diverse education. We support these endeavors with funds from Measure 49, providing cultural awareness and diversity, collaborative partnerships, community outreach, retention and recruitment of people of color, and opportunities for leadership and educational development.

Rainbow Theater History

Rainbow Theater was established in 1993 under the creative vision of Mr. Don Williams with the overall mission to create unity, higher visibility and an understanding of the various cultures represented within our communities. The goal of this theater troupe is to first, foster the spirit of solidarity by breaking down cultural walls and to secondly, provide an outlet for creative talents within various ethnic communities by giving voice and promoting dialogue. As a whole, Rainbow Theater constantly works to celebrate diversity, promote higher education and foster communities, providing students with educational, academic, professional and leadership opportunities. Since the passing of Measure 49 in the Spring season of 2011, Rainbow Theater has been given the opportunity to put on various productions as well as sponsor a multitude of professional shows and events each at no additional cost to the students. As an organization, Rainbow Theater, is working year-round to provide workshops, a series of lectures, outreach programs, professional and student productions and community events to UCSC and schools and communities all across California.

African American Theater Arts Troupe History

The African American Theater Arts Troupe (AATAT) is a student-based organization that came together under the leadership and direction of Donald Williams in 1991. AATAT was formed as a vehicle to create unity, higher visibility, and understanding of the African American culture here at the University of California, Santa Cruz and the greater Santa Cruz community. The Theater Troupe not only casts UCSC students from different educational backgrounds, but also casts students that have little or no experience with acting, technical, and administrative work so as to allow anyone the opportunity to get involved with the program. The troupe is the only one of its kind in the UC System.

Measure 49 History

In the Spring of 2011 the students of Rainbow Theater, AATAT, and supportive affiliates campus-wide, ran a referendum called Measure 49 to support Cultural Arts and Diversity at UCSC due to the ongoing detrimental University budget cuts. Measure 49 is a student fee of \$5.25 per student per quarter to support CAD programming, purchases and maintenance of state-of-the-art theatrical equipment, and both student and professional staffing. Measure 49 was passed on May 27th, 2011. Cultural Arts and Diversity expands by supporting other cultural arts groups and organizations on campus, such as the Indian Student Association, the Filipino Student Association (Bayanihan), and Los Mejicas. 5 events are free of charge to UCSC students. The purchase and maintenance of state-of-the-art

equipment in the Stevenson Event Center enhances all events, plays, and programs professionally and theatrically. This partnership with Stevenson College ensures CAD's ability to secure time slots in the Stevenson Event Center calendar for student cultural organizations, affiliated and registered with CAD, to use the space for rehearsals and performances, free of charge. Funding will also support workshops, outreach and retention programs, speaker series, lectures, and one-person shows. The funds are governed by a student governance board (CAD Board of Directors).

Outreach

Every season run, CAD sponsors an outreach team to connect with high school students of color and discuss how college is attainable for them. Through theatre games and personal testimonies, the team offers information on financial aid and extra-curricular activities available at the UCSC campus that cater to communities of color. AATAT representatives focus on the Seaside-Monterey Bay area in winter and Rainbow representatives head out to Los Angeles in the Spring.

[Link to CADrc Theatrical Manual for Rainbow & AATAT](#)

SOMeCA Mission

SOAR/Student Media/Cultural Arts and Diversity (SOMeCA) is dedicated to the success of UCSC's campus-wide student organizations.

Student organizations are transformative learning environments, vital to the educational mission of the university. They offer students opportunities to engage as leaders and to make a difference. They create programs and productions that build community and campus-wide discourse.

SOMeCA's professional and experienced staff offers leadership training, mentorship, organizational advising, instruction, and project management so students can:

- Develop educational and professional pathways
- Connect with successful and dedicated alumni
- Advance their voice and leadership in university decision-making process
- Build supportive communities
- Be empowered to foster diversity and civic engagement
- Create events and productions that reflect their diverse experiences

SOMeCA services are designed in collaboration with students and colleagues to meet the changing needs of the UCSC student body.

CAD Office Staff

Mr. Williams: Artistic Director of the Cultural Arts and Diversity Center (CAD); Active member of CAD and SoMECA Board; Producer of Rainbow Theater; Director and Producer of AATAT; Professor and Lecturer for Rainbow Theater, the African American Theater History Class, Rainbow Theater: Cultural Studies course, and Cabrillo College's Fall Intro to Acting class and the Spring 1940's Radio Drama.

CAD Administrative Assistant: Mr. Williams' Staff Assistant. This individual works approximately 30 hours per week, fulfills all CAD and Measure 49 duties, administrative work and finances. Any necessary actions regarding CAD will be completed via Mr. Williams or this assistant. For a more detailed job description please turn to the purple tab.

Office Manager: This new role fulfills the need for management over office tasks, committees, and serves as master-calendar keeper for the year's functions, events, and productions.

CUIP Intern: This individual is the Production Assistant Coordinator, working approximately 15- 20 hours per week. This individual manages administrative and financial work for CAD, specifically for AATAT and Rainbow Theater. Represents CAD's treasurer.

Two Research Production Coordinators (Student Assistants): This individual works 10-12 hours per week. They complete various office tasks, assist in production details for AATAT and Rainbow Theater and in any necessary paperwork throughout the year.

Assistant Marketing Coordinators: These individuals work 15-20 hours per week. They handle CAD's social media and PR presence online. They work on our social media platforms and keep our website up-to-date and curate and publish media daily.

[Link to Marketing Strategies Document](#)

Positions & Committees

The CAD Board of Directors (BoD) represent the leaders of Rainbow and AATAT and are responsible for overseeing the use of Measure 49 funds. Passed in 2011, this student fee supports CAD programs and sponsorship of other cultural campus organizations, state-of-the-art theatrical equipment, staffing, and free entry to all CAD programs for undergraduates. The Board meets regularly to evaluate funding requests for other orgs, programs, speakers and lecturers, and other events. They are advised by non-voting staff.

Chair

- must have at least one year CADrc leadership experience
- knowledgeable and comfortable in use of Robert's Rules for parliamentary procedure
- weekly meeting with Don Williams
- day-of reminder to all Board members about meeting
- lead Board meetings with assistance of Vice Chair
- establish biweekly one on ones with some Board members
- coordinate with Vice Chair, Ambassador of Ethnic Orgs, and Stevenson Liaison regarding meetings with SUA, UCSC NAACP Chapter, ethnic orgs (i.e. ISA, Grupo Folklorico, Big 5) and other spaces as necessary
- represent CADrc Board as necessary to other organizations

Vice Chair

- must have at least one year CADrc leadership experience
- knowledgeable and comfortable in use of Robert's Rules for parliamentary procedure
- assist Chair in leading Board meetings
- establish biweekly one on ones with some Board members
- coordinate with Chair, Ambassador of Ethnic Orgs, and Stevenson Liaison regarding meetings with SUA, UCSC NAACP Chapter, ethnic orgs (i.e. ISA, Grupo Folklorico, Big 5) and other spaces as necessary
- assist all Board members in duties as necessary
- represent CADrc Board as necessary to other organizations

Historian

- must also be a member of the Marketing Team, working on Archiving during the summer
- summarize past events in CADrc history
- archive all published news and media about CADrc, such as pictures, testimonials, newspaper articles, and press releases
- maintain physical and digital file of past, current, and upcoming events for the year
- maintain and document feedback on presentations and surveys held throughout year
- assist media with information about programs and events

Secretary

- ensure minutes for meetings are taken with attendance recorded and clear distinction of decisions made
- organize meeting notes, distribute (via email) when finalized, along with a concrete to-do list
- be aware of what paperwork is necessary, communicate with office staff to ensure it is made available to all of Board
 - ◆ when forms are sent out to be completed, ensure collection and filing in a timely and organized manner
- collect and submit to CADrc office Board member contact information
- monitor and respond to all Board communications and inquiries

Treasurer

- record and maintain all budgetary proposals (approved and not approved) and transactions for CAD archives with Secretary
- audit Board finances monthly, with an emphasis on funds used or not
- understand and translate for Board each proposal's budgetary impact
- understand CAD's ticketing and fundraising systems
- create a monthly in-depth update for the Board about state of budget
- maintain a connection and regularly meet with SOMeCA's budget advisor Francisco and other SOMeCA fiscal representatives
- hold a weekly meeting with the Board's Budget Committee about current state of budget

Stevenson College Liaison

- must be a Stevenson College affiliate
- work in partnership with Ambassador for Ethnic Organizations
 - ◆ Supervise Monthly General Body meetings
- connect with and contact the Stevenson Student Council and Rosa Parks African American Themed Housing as needed
- Manage the Stevenson MOU and room reservations at Stevenson
- relay information, updates, suggestions, and questions between organizations and Board
- create collaborative events with organizations to educate more students about diversity

Ambassador for Ethnic Organizations

- work in partnership with Stevenson College Liaison
 - ◆ Supervise Monthly General Body meetings
- regularly connect with and contact at minimum the Indian Student Association, Bayanihan, and Grupo Folklórico Los Mejías
- attend and correspond with one of the above organization's meetings quarterly
- relay information, updates, suggestions, and questions between organizations and Board
- create collaborative events with organizations to educate more students about diversity

COMMITTEES

(subject to change)

Budget; meets with our Financial Advisor to determine spending and our fiscal status

AATAT Vision; works with AATAT leadership, alumni board, and other involved groups to demand the embrace and solidification of AATAT at UCSC.

Examples of others; AATAT30 Committees, Outreach, Special Events, MOU

Committees are established as necessary; currently, these two are ones that have been and will continue meeting consistently throughout this fiscal year.

The Art of The Email

A big part of coordination, planning, and being a dependable leader is our communication skills, especially in the digital age. When it comes to emails, we want to communicate with grace, tact, and specificity.

Email Essentials:

- **Consider your audience;** keep in mind who will be reading the email and what the relationship is between you and the audience. Be professional and polite. This means replying to emails in a timely manner as well.
- **Be clear and specific;** make sure your recipient(s) understand why they're being emailed and what they're supposed to do in response to the email.
- **Add context to email forwards;** Make sure to include why you're forwarding the email and what you want them to do.
- **Keep it as concise as possible;** Whether it's a newsletter or a request for a service or information, or an invitation to an event, don't make the email longer than it needs to be. Be detailed, but short and sweet.
- **Proofread/Timing;** Make sure to check for typos and grammatical errors. In order to have a professional email, clear language means good writing. Do keep in mind the time of day you are sending notifications. It's good practice to keep communications within the working day (8am - 6pm) unless it's an emergency email among your colleagues. Remember, you're able to schedule-send!
- **Remember to follow up;** (Doesn't apply to newsletters) Whether you have or haven't gotten a response from someone, make sure to send a follow up email, either to answer questions, give updates, or to request a response. This goes a long way in maintaining meaningful relationships with our CAD family.

Proper Email Formatting:

1. **Subject Line;** make sure your subject line addresses the goal of the email and that the audience will know what to expect immediately as well as being able to easily locate the email later.
2. **Salutation;** make sure to start with a greeting. You are talking to real people and it's always kind to check in, especially in the time we live in today. Always lead with empathy.
3. **Body;** this is where the details of your message live and it can be helpful to separate topics by paragraph if you're bringing multiple action items or information.
4. **Closing;** Include a closing line with a greeting to wrap up the message (a 'thank-you' goes great here!)
5. **Signature;** This is where you identify yourself by name, pronouns, title and any other information relevant to your communications.

CADrc Online Presence

Especially in our current age, our website and social media are vital when it comes to our community engagement and marketing for productions and student opportunities at CAD. With that, we want to maintain a social media presence that not only engages, but also builds rapport and maintains relationships with our students, alumni, and partners.

Tips for Social Media Etiquette:

- ★ **Read the room;** Saying the right things at the right time makes a difference.
- ★ **Respond to comments & DMs;** This is important because we are able to get real-time questions and feedback from our various community members, so giving meaningful responses is essential.
- ★ **Be kind and courteous;** We want to make a good impression with everyone we meet, online or otherwise, so when responding to questions or feedback, whether it's on CAD accounts or not, if it's about CAD programs, be respectful and diplomatic.
- ★ **Go easy on the hashtags;** We are an organization, not a brand, so when using hashtags, make sure they are relevant to what you're posting and/or to CAD as a whole. Finesse is key.
- ★ **Don't mix business & pleasure;** post what is appropriate to our organization and be wary of what you're liking or commenting on, because when you're on the CAD accounts, you are CAD. It is nice to like, follow, and comment on other UCSC orgs, or other educational/cultural accounts for posts we can relate to. Keep it professional.
- ★ **Keep our mission in mind;** If it doesn't align with CADrc's mission statement, then you probably shouldn't do it. Don't be afraid to use your fellow board members or Mr. Williams as a sounding board. If you're unsure about something, check in with someone to see what they think about your ideas, we represent each other after all.

With all this in mind, you will be able to successfully participate in the growth of our online presence. We are always looking to engage in new ways and connect with others while representing ourselves and our programs well.

CAD Podcasting

Rainbow Theater's 2020 season, during the (ongoing) COVID-19 pandemic spurred the board members to come up with solutions quickly, thus The Rainbow Theater Podcast was born. Now that we successfully aired the entire Rainbow season on a Spotify podcast via SoundTrap, we are continuing on with a CAD podcast for 2020's general election. It is clear podcasting will be another form of media CAD will continue to use, so here are some guidelines for our current podcasting.

Tips for Successful Podcasting:

- ❖ **Have a greater goal in mind;** When coming up with a podcast series or topic to cover, make sure you know enough about the subject to get started and know ahead of time what the overall purpose and expected outcome is for the podcast's release.
- ❖ **Delegate wisely;** Be aware of who is comfortable and willing to host, edit, and schedule interviews/recording sessions in a timely and effective manner.
- ❖ **Focus on our target audience;** What is this offering our communities? What would we like their takeaways to be, and how can we impact them?
- ❖ **Create actionable content;** Being clear about what an audience can do to get engaged in bigger CAD/global events is essential to viewer engagement.
- ❖ **Stay on topic;** Scripts and pre-written questions are wonderful tools, as well as keeping time and having an idea of the arc you want to have in each episode.
- ❖ **Invite unique guests/experts to the show;** Make sure invitees can contribute in a relevant and meaningful way to whatever the show's topic is (this is often alumni).
- ❖ **Take notes/have a roadmap;** keeping track of the times during interviews and creating notes can help the editing team/process in order to create the episode with the vision of whoever is directing.
- ❖ **Meet with the editing team regularly;** be clear about the tones/moods/etc. that is desired in the episodes.
- ❖ **Stay on schedule;** this may be the most obvious tip, but it's also the most important while being the hardest to follow. Keep yourself and others accountable and ask for outside help if needed.
- ❖ **Post on social platforms and get feedback;** listening parties, social media blasts, and telling friends and family is a great way to not only recruit new people into the CAD community, but also to get feedback on what we're working on and what our communities would like to see/hear.
- ❖ **THANK OUR SPONSORS! SOMeCA, Measure 49, David E. Kaun, Donors, etc.**

Other Resources

Relevant Contacts (Links Underlined)

1. Department Contacts

- a. Use these for email blasts, notifications, as well as reaching out to these departments to request that they put up our flyers around their buildings or include our electronic flyers in their email blasts (this is especially relevant for Theater Arts and Creative Writing, as well as cultural studies and other arts-related departments).

2. SOMeCA Staff Contacts

- a. Our SOMeCa staff is extremely friendly and helpful and one of our biggest resources. It's good to get to know these folk and reach out to them with questions about SOMeCA workshops, training, etc.

3. CAD Alumni Contact List

- a. We always want to bring back our alumni and include them in things we do every year because that's our family and we are building on the work they've done in the past. Lots of our alumni are still very involved with CAD and are supportive of the work we continue to do, so feel free to contact them about special events, projects, etc.
- b. Various AATAT and Rainbow Contact Lists are within the drive, our hope is that our Historian will merge all of our contacts into one or two documents.
- c. We also hope that contact lists will be made specifically for leadership alumni if these files can be found

4. **Other contacts: Our Instagram and Facebook pages are great ways to connect with other organizations and leaders at our college as well as alumni, so don't be afraid to reach out using these platforms.**

5. **CAD PASSWORDS; BE CAREFUL AND RESPECTFUL**, you represent CAD and should always act and communicate with regard to our mission. DO NOT allow anyone who isn't on CAD Board of Directors or the CADrc Office Staff access to this information.

How and Why to Write a Press Release

A press release is free publicity that takes only a matter of minutes once you have a format down. It conveys information succinctly - one page, or if truly necessary, two pages - and without embellishment. The facts speak for themselves. The best press release will present a problem, and the item you are writing about then presented as a solution. It should be written on letterhead with formal business headings to be distributed by email (pdf) or snail mail to key figures, like reporters and directors of organizations. A copy should also be archived for public access on the organization's website.

The brief:

1. For immediate release
2. Business heading
3. Attention grabbing headline (subheading only if necessary)
 - a. this should be something that you can see published as a headline
4. Present a problem
5. Present solution: your product / event
6. Who, what, when, where, why, how answered
7. Contact information
8. Choose who to distribute to
9. Distribute and post to website
 - a. emails should be titled [headline], not 'press release,' to stand out

My suggestions for CAD are to always distribute a press release to

1. All College programs offices (check college websites for contacts)
 - a. Cowell
 - b. Stevenson
 - c. Crown
 - d. Merrill
 - e. College 9
 - f. College 10
 - g. Kresge
 - h. Porter
 - i. Rachel Carson
 - j. Oakes
 - k. Family Student Housing
 - l. Redwood Grove / Graduate Student Housing
 - m. Trailer Park
 - n. The Village
2. SOAR - ask if they can distribute to all org leadership
3. Major Departments
 - a. Theatre Arts
 - b. Feminist Studies
 - c. History
 - d. Languages and Applied Linguistics
 - e. Literature
 - f. History of Consciousness
 - g. Community Studies

- h. Anthropology
 - i. Education
 - j. Latin American and Latino Studies
 - k. Politics
 - l. Legal Studies
 - m. Psychology
 - n. Sociology
 - o. Film and Digital Media
 - p. Digital Arts and New Media
 - q. History of Art and Visual Culture
 - r. Music
 - s. Art Department
4. Good Times
 5. Santa Cruz Sentinel
 6. City on a Hill Press
 7. Banana Slug News (broadcast)
 8. Fishrap Live!
 9. KZSC
 10. African American Resource and Cultural Center
 11. American Indian Resource Center
 12. Asian American / Pacific Islander Resource Center
 13. Lionel Cantú Gay Lesbian Bisexual Transgender Queer Intersex Resource Center
 14. Chicano Latino Resource Center (El Centro)
 15. Womxn's Center
 16. Engaging Education (e²)
 17. Hispanic Serving Institution (HSI) Initiatives
 18. First Generation Initiative
 19. Educational Opportunity Programs (EOP)
 20. Programs in Community Agroecology (PICA)
 21. Center for Agroecology and Sustainable Food Systems (CASFS)
 22. Enviroslug

[PRESS RELEASE FORMAT]

INSERT LOGO HERE

DATE

FOR IMMEDIATE RELEASE

Contact Name

phone

email

website

location

HEADLINE IN ALL CAPS

Indented Sub Heading in Title Case

Create an introduction here that poses a problem. Statistics are useful to show issues' existence. Make sure your sentences are all different lengths - having sentences that are all the same length are boring. Don't do that!

Now put in a little bit of information connecting your statistic to what you do. Something like 'Cultural Arts and Diversity Resource Center (CAD) is once again sponsoring a professional production to educate and entertain the UC Santa Cruz community for free.' This is a good spot for a quote from Don Williams, the head of one of the ethnic resource centers, or another applicable organization.

Show Name is directed by lecturer Don Williams, starring alumn[a/us] Star Power, and undergraduates Janet Mock, Frederick Douglass, Peggy Ellen Cooper, and So Sa Im.

Give information about the actual event - date, time, location, cost, and anything students should know: food available for purchase / free, bring questions, this event is family friendly. Give factual information without fluff to hype up the event: don't say 'this awesome event is going to be the coolest concert of the year,' say 'this concert will be the first event this year to incorporate a lightshow utilizing the local fog cover.'

The Cultural Arts and Diversity Resource Center, founded 2005, strives to enhance the cultural climate of the University of California, Santa Cruz and its surrounding communities by celebrating diversity via our theatre troupes Rainbow and AATAT. We provide cultural awareness and diversity, collaborative partnerships, community outreach, retention and recruitment of people of color, and opportunities for leadership and educational development with the support of Measure 49.

END OF RELEASE

Give contact information here - email, website, physical office address, and office hours.

[PRESS RELEASE EXAMPLE]

INSERT LOGO HERE

Cultural Arts and Diversity Resource Center

For immediate release

Kill Date: 11 May 2018

Event: NAME OF EVENT
Who: CAD / RAINBOW / AATAT (& OTHER ORGANIZATION)
When: DATE AND TIME
Where: ADDRESS
SINGLE SPACED LINES
Cost: UNDERGRAD \$10
GENERAL \$20
available at website.com / at the door / ahead of time at [place]
Contact: NAME | EMAIL@EMAIL

Use statistics to illustrate a problem. Make sure your sentences are all different lengths - having sentences that are all the same length are boring.

Now put in a little bit of information connecting your statistic to the event. 'Cultural Arts and Diversity Resource Center (CAD) is once again sponsoring a professional production to educate and entertain the UC Santa Cruz community about [issue].' Add a quote from Don Williams, the head of one of the ethnic resource centers, or another applicable organization.

Show Name is directed by lecturer Don Williams, starring alumn[a/us] Star Power, and undergraduates Janet Mock, Frederick Douglass, Peggy Ellen Cooper, and So Sa Im. Give yourself three lines here to name all actors.

Give a brief on information about the actual event not included above - anything students should know: food available for purchase / free, bring questions, this event is family friendly. Give factual information without fluff to hype up the event: 'this is the coolest concert of the year,' versus 'this concert will be the first event this year to incorporate a lightshow utilizing fog cover.'

The Cultural Arts and Diversity Resource Center, founded 2005, strives to enhance the cultural climate of the University of California, Santa Cruz and its surrounding communities by celebrating diversity via our theatre troupes Rainbow and AATAT. We provide collaborative partnerships, community outreach, retention and recruitment of people of color, and opportunities for leadership and educational development with the support of Measure 49.

END OF RELEASE

How to Read a Ledger

The summary page will give a large overview of all monies within an organization. Transactions by date will show individual transactions.

Fiscal Year 2018 Summary As of 8/29/2017

organization: 680020, sub category: 20000, what you are looking at: University Student Services Fee, what money is this?: Measure 49, money unspent from previous years: 80,000.00, adjustments: 0.00, money spent so far this year: 500.00, money earmarked to be spent but not sent out: 81,500.00, total available money: 81,500.00

Org	Fund	Activity	Title	Chwd Budget	Perm Budget	Budget Adj	Total Budget	Expenses	Liens	Balance
680020	20000		University Student Services Fee	2,000.00	80,000.00	0.00	82,000.00	500.00	0.00	81,500.00
Total				2,000.00	80,000.00	0.00	82,000.00	500.00	0.00	81,500.00
680020	20385		CULTURAL ARTS & DIVERSITY FEE	60,000.00	120,000.00	0.00	180,000.00	(500.00)	0.00	180,500.00
680020	20385	CAADVT	CULTURAL ARTS & DIVERSITY FEE	0.00	5,000.00	0.00	5,000.00	1,000.00	0.00	4,000.00
680020	20385	CAOPER	CULTURAL ARTS & DIVERSITY FEE	0.00	4,000.00	0.00	4,000.00	20.00	30.00	3,950.00
Total				60,000.00	120,000.00	0.00	180,000.00	570.00	0.00	179,430.00

activity code: what is the money specifically set aside for? CAADVT, CAOPER, Measure 49, parentheses mean a negative in financial reporting. Since this column is for expenses, that means that this was not an expense, but a credit: money in. total of all money in this fund category: 179,430.00

Fiscal Year 2018 Transactions by Date As of 7/31/2017

fund code and name: 680020 20385 SA/CAD CULTURAL ARTS AND DIVERSITY FEE, no activity code means it was not a budgeted item: NO ACTIVITY CODE, any non-business name descriptions should always follow the format source: reason to help identify the purchase: BAYTREE: SWEATSHIRTS, 6-digit codes like this signify a recharge, which means we paid another campus group, like CHP or the Baytree: 001210

Date	Description	Doc Code	Ref 1	Ref 2	Account	Account Title	Budget	Expenses	Liens	Balance
07/11/2017	BAYTREE: SWEATSHIRTS	J0123456	234567		001210	SUPPLIES-NOT OTHERWISE CAT	0.00	100.00	0.00	100.00
Total							0.00	100.00	0.00	100.00
CAADVT - PUBLICATIONS & ADVERTISEMENTS										
Date	Description	Doc Code	Ref 1	Ref 2	Account	Account Title	Budget	Expenses	Liens	Balance
07/12/2017	ALPHAGRAPHICS	P0789101			000050	PRINTING-FORMS, STATIONERY	0.00	75.00	0.00	
07/5/2017	BUSINESS WITH PLEASURE	P0111213			000050	PRINTING-FORMS, STATIONERY	0.00	250.00	0.00	
07/10/2017	CHP: Primer	J0789101	289101		001280	SERVICES-MISC	0.00	0.00	170.00	
07/17/2017	ALPHAGRAPHICS	P0789101			000050	PRINTING-FORMS, STATIONERY	0.00	(25.00)	0.00	
Total							0.00	350.00	170.00	520.00

date the transaction hit ledger may not be date of purchase: 07/11/2017, if we did not write the description, it will be the business name: BAYTREE: SWEATSHIRTS, parentheses mean a negative, so in this case this means money returned: (25.00), money unspent - may not have hit ledger yet, or may be excess of actual cost: 520.00, all liens and expenses: 170.00

How to Fill Out a Purchase Request (PR)

Take note:

- Is this *Purchase Request* for a service, supplies, or food/beverages?
- How long do you have between the time you are filling out the *PR* and the event itself?
- Is the vendor in the system?
- Where is the event being held?
- Who is putting it on (Rainbow, CAD, or AATAT)?
- If you are getting food, who will be going to get the food permit?
- If getting refreshments, WHAT type of food are you getting?

Please keep in mind that the **Food and Supplies** take **6 business days** to process. **Services** take **11 business days** to process, and require a quote.

A quote may be in email format but must have:

- Name of the vendor.
- Contact information of the vendor (minimum email and phone).
- What services will be performed, with the date and location.
- How much is being charged.

Please remember that if you are paying for a **service** out of your own pocket, you cannot be refunded.

Service

Speakers, paying for an event venue (a place where we would be leaving without a product in hand), advertisement in the newspaper, etc.

Supplies

Gear, props, etc.

Food/Beverage

Food and beverages. Any supplies related to food (cups, plates, tablecloths)

Fill the PR out online, print it, and submit it to the Financial Manager.

Form link: <http://soar.ucsc.edu/v2/studentorgs/forms.html>

Full SOMeCA Guide:

https://someca.ucsc.edu/resources/fiscalguide_fy21_purchase-request-form1.pdf

Example of filled out form:

Do not forget to have a Board Member sign as the Authorized Signer, and check off whether supplies, services, or food/beverages are being purchased.

Purchase Request



Date Needed 10/9/2020

Return completed form to your SOMECA office at least 5 business days for food or supplies or 10 business days for services prior to the date it is needed.

SECTION 1 – CONTACT

Name Sammy Slug	Organization Turtle Club
Email sslug@ucsc.edu	Phone 831.459.2934

SECTION 2 – EVENT OR OPERATIONAL (SELECT ONE OPTION)

<input checked="" type="checkbox"/> 1 Event Professional Development	Date 10/9/2020	<input type="checkbox"/> 2 Operational Supplies not related to an event
<input checked="" type="checkbox"/> Location Zoom	Estimated Attendance 20	

SECTION 3 – VENDOR (MUST HAVE 204 FORM ON FILE)

Vendor Turtle Sammers	Street 1156 High Street	City Santa Cruz
<input checked="" type="checkbox"/>	This vendor has not been a UC employee in the past 2 years. <i>If they have, do not continue. Contact your advisor.</i>	
Purchase Type Service	Brief Description of Items to be Purchased: Mr. Turtle will be a guest speaker	
Service: Quote required	Food & Beverage: Speak to an advisor	

SECTION 4 – PAYMENT

Indicate the amounts from the fund sources below to balance the total cost.	Notes: Please indicate needs for SOMECA to process.
EARNED INCOME \$ 250.00	n/a
EARNED INCOME \$	
TOTAL COST including tax & delivery may not exceed: \$ 250	

SECTION 5 – AUTHORIZATION

I certify this purchase request form by signing below, or via email from my UCSC Account.

Authorizing Signature	Print Name (if different from contact above) Sammy Slug	Date 9/25/2020
-----------------------	---	----------------

OFFICE USE ONLY

Fund	Org	Account	Activity	Amount	Requisition #	Initials
					PO #	Initials
Advisor Approval						
Org Approval			Date	F&E Approval		Date
						F&E #

Receipt & Quote Requirements

Generally we will need a quote when purchasing an item—for all services (purchases that do not end with a tangible product in hand) and some supplies (like posters). Other times it is best to receive one ahead of time—perhaps when buying in bulk or purchasing electronics.

Quotes are required to have:

- Vendor name
- Vendor contact information (Phone, email, address, or up to all three)
- What services to be rendered (e.g. 3 nights stay in hotel)
- Under what conditions (e.g. Must have individual 25+ staying overnight)
- Not to exceed amount (Cost, sales tax, shipping costs, &c)

Remember, you cannot sign any quote on behalf of the university! Turn in an unsigned quote with your purchase request.

When purchasing an item—either with a PO or for reimbursement—always obtain a receipt. If you are using a PO, do not forget to check with the cashier or store management to verify if you need to take an additional step after making a purchase (e.g. Safeway requires you to go to the customer service desk so they can fill out paperwork for their administration people).

Regardless of how things are being purchased, a receipt must always be/contain:

- Original—no copies!
- Itemized List
- Business contact information
 - if handwritten, attach a business card
- State *\$0 balance due* OR *last 4 digits of a credit card number* OR *'total paid'*

Regardless of receipt or quote status, one can never be reimbursed for services. Always check ahead of time and complete all paperwork before purchasing an item to be reimbursed.

SOMeCA Forms/Resources

1. **SOMeCA Financial Forms (Purchase Requests, Frequently Used Vendors, Reimbursements, etc.)**
2. **Protocols for Organization Programming**
3. **Student Agency Model Toolkit**