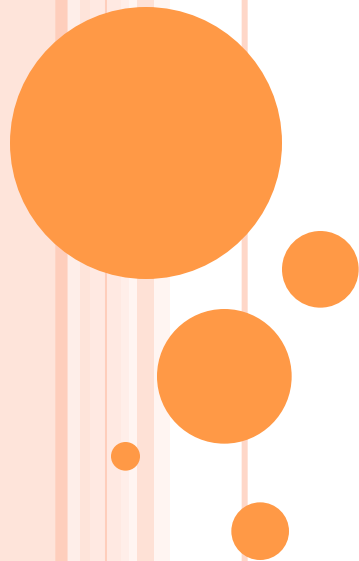


# **GSA FUNDING INFO SESSION 2016-2017 ACADEMIC YEAR**

**Brittani Hudson – GSA Business Manager**

**September 11, 2016—GSL**

**The Rutgers Graduate Student Association**



# PURPOSE

- To clarify funding policies and procedures
- To ensure that the GSA is providing clear and consistent guidelines and information
- To hold GSOs accountable for abiding by the policies and procedures
  - Please pass info along to anyone in your GSO who will be handling events, requesting reimbursements, or submitting PERs
  - Note: If your GSO changes officers in Dec/Jan, the new treasurer must meet with the business manager to go over this presentation. Your GSO remains accountable to following all policies and procedures and exceptions will not be allowed.



# AGENDA

- Recognition
- Funding Policies
- Event Expenses
  - Programs & Events
  - Event Series
  - Conferences
  - Honoraria
- Paperwork
  - Post-Event Reports (PERs)
  - Honorarium Requests
- Check Processing & Pickup
- Questions?



- All figures and dollar amounts are on a **one-year academic basis** starting from the beginning of the Fall 2016 semester.



# RECOGNITION

- All GSOs, new and existing, must submit recognition applications each year
  - GSO name & type (academic/departement or non-)
  - Constitution & Mission Statement
  - Membership list w/ e-mail addresses
  - Officers
  - Comments (# of part-time/full-time students)\*
- **2016 Deadline: September 18th by 5:00pm**
- GSA Secretary approves/provides comments
  - Please email [Secretary@gsa.Rutgers.edu](mailto:Secretary@gsa.Rutgers.edu) (with a copy to [Help@gsa.Rutgers.edu](mailto:Help@gsa.Rutgers.edu)) with the above listed information for recognition purposes



# FUNDING POLICIES

- Limits (4.1 & 4.2)
  - \$4,500 maximum allocation per group, per year
    - \$4,000 non-participation limit (spring allocation will be reduced)
  - \$2,500 conference maximum per group, per year Included in total allocation
  - Events are limited by allocation AND attendance
    - Breakfast/Snacks--\$5/attendee
    - Lunch--\$7.50/attendee
    - Dinner--\$10/attendee
      - Accurate estimation of attendance or confirmation required; funds cannot be transferred to cover overspending based on lower than expected attendance
      - Limit includes drinks



# FUNDING POLICIES

- Limits (cont' d)
  - \$1,000 per person maximum for honoraria
  - \$1,000 per person for travel reimbursement
  - \$250 per person, per evening for hotel reimbursement
  - \$46 per person, per day for meal reimbursement
  - Post-Event Meal with Visiting Speaker & Students
    - Same limit applies for speaker's meal
    - \$30 per graduate student attendee AND \$150 maximum for graduate student attendees



# FUNDING POLICIES

## ○ Rules

- No durable goods
  - Semi-durable for single event OK (e.g., disposable tablecloths or poster board)
- On-campus ONLY -- (Cook, Douglass, College Ave, Busch, or Livingston)
  - Locations close to campus, at a department-affiliated site, or a restaurant are NOT allowed
  - Exceptions: Post-conference meal w/ speaker or BBQ in local park (with approval)
- **No honoraria for Rutgers affiliates (e.g., administrators, faculty, staff, students)**
- No academic prizes
- No funds for events taking place before, or the same day, as council meeting where funding is approved





# FUNDING POLICIES

## ○ Rules (cont' d)

- No reimbursement for events that violate any laws
- No reimbursement for events that involve religious proselytizing or worship
- No reimbursement for alcoholic beverages
- No reimbursement for disposable items when durable/ kitchen are available

## ○ Essential Requirements

- Events must meet EGS (entirely grad student) guide
- -It is okay to have some departmental funding and involvement in events, but funding eligibility can be denied if it becomes apparent that department staff are too involved in event planning and logistics



# FUNDING POLICIES

- Essential Requirements (cont' d)
  - All events must be advertised
    - Must include date, time, and location of event
  - All events must have an original handwritten sign-in sheet
    - A typed list or one person's handwriting is not acceptable
    - Include event details on each page
    - Post-event dinner requires a second sign-in sheet
  - All events must adhere to funding limits
  - Original receipts are required for reimbursement
    - All submitted receipts must be itemized
    - Vendor invoices require both invoice and proof of payment



# FUNDING POLICIES

- The GSA understands that there are a number of policies to keep in mind and follow. We encourage you to contact the business manager ([help@gsa.rutgers.edu](mailto:help@gsa.rutgers.edu)) with any questions in advance of your events.



# FUNDING APPLICATIONS

- Fall 2016 Funding & Recognition Process:
  - Due to lack of functionality of funding website (gso.Rutgers.edu), the GSA will temporarily be operating on an honor basis:
  - At this time, funding applications can be submitted through Google Forms.
    - Applications must be submitted at least 2 weeks prior to events.
    - If submitted by mail please allow additional time ahead of your event for approval.
  - PERs are still required for reimbursement.
    - Reimbursement will be only be issued if all funding guidelines are adhered to including the \$4,500 academic year cap.



# PAPERWORK

- Post-Event Reports (PERs)
  - All PERs are due within 90-days of the event OR the end of the semester; whichever is sooner
  - Must fill in all information on all 3 pages
    - Time of event required to determine reimbursement
    - Sponsoring organization = your GSO name
    - Attendance must match sign-in sheet and show actual not expected
    - Receipts, announcement, and handwritten sign-in sheet required
    - Itemize expenses on page 2; include item numbers
    - List payees on page 3; reference item numbers from page 2
    - Put contact information on page 3 as well
    - Do not forget to sign page 3



# PAPERWORK

- Post-Event Reports
  - Do not staple anything to the front of the PER
  - Ensure all attachments are secure before dropping off
  - Please write legibly especially on payee names and contact email
- Honorarium Agreements
  - Submit at least 2 weeks before event (4 weeks for non-US citizens\*)
    - Include speaker, amount, and event details; as well as address and social on agreement and W-9
    - NO signature or date
  - Pick up check and original forms in advance and give check to speaker AT event
  - Get signatures and dates when you give the check.



# PAPERWORK

- Honorarium Agreements (cont' d)
  - Return documents with PER
    - PER, with supplemental documents, is required even if there are no other reimbursed expenses
  - \*If your speaker is a Foreign Visitor/Entity, there is additional paperwork--You must start this process at least one month in advance
- Note: Sending honorariums after an event has taken place will not be allowed unless there are extenuating circumstances communicated in advance
- Please download current forms from our website.



# CHECK PROCESSING & PICKUP

- Processing time is typically 2 - 3 weeks after PER is submitted
  - May take longer, particularly at the end of the semesters.
  - Submit PERs sooner if there is a time-sensitive reimbursement or invoice payment
- An email will be sent when the check is ready
  - Whoever is listed on the PER will be contacted
- Checks expire after 90 days
  - Be prompt about picking up checks
  - Reissues **will not be allowed** except in extenuating circumstances.
- Pick up during scheduled office hours





# QUESTIONS?

## ○ Contacts:

- Recognition ([secretary@gsa.rutgers.edu](mailto:secretary@gsa.rutgers.edu))
- Allocations ([treasurer@gsa.rutgers.edu](mailto:treasurer@gsa.rutgers.edu))
- Reservations/Vendors ([events@gsa.rutgers.edu](mailto:events@gsa.rutgers.edu))
- Reimbursements/Paperwork/General Questions ([help@gsa.rutgers.edu](mailto:help@gsa.rutgers.edu))

