



RUTGERS

UNIVERSITY | NEW BRUNSWICK
Graduate Student Association

GSO Finance Training

Graduate Student Association
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The GSA Finance Team



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Purpose of workshop

- **Provide guidance** on GSA policies and procedures for recognition, funding, and reimbursements
- **Foster ideas** for what sorts of events/activities are reimbursable
- **Empower you and your group** to plan fun, exciting, and meaningful activities to support graduate students
- **Demystify** the process of operating a GSO with respect to the GSA
- Note: This is NOT meant to be exhaustive
 - Particularly regarding if something is a “durable” good or not...
 - **If you are unsure if something can be reimbursed or is proper procedure, please ask!**
 - **Reimbursements may be denied** if they are not in accordance with GSA and University guidelines.



Funding Goals of GSA

As stated in the GSA constitution, “The mission of the GSA shall be to further graduate student interests; graduate student-University relations; and the social, cultural, and academic enrichment of graduate students.”

This makes it clear that **graduate students, their interests, and their enrichment must be the focus of all that the GSA does or seeks to do.**

A complementary goal of the GSA and its funding policies is to preserve the right of graduate students and graduate student organizations to make their own decisions about what types of programming best promote their interests and to empower them with the resources to carry out that programming.



Key Resources

- GSA Website: <https://gsa.rutgers.edu/>
- Graduate Organizations > Event Guides and Resources:
<https://gsa.rutgers.edu/for-gsos-2/event-guides-and-resources/>
 - Event Materials: GSA logo & funding statement
 - PDF Forms: Any forms required to be submitted electronically
 - Electronic Submission Portals: Places to submit above PDF forms
 - Governing Documents: GSA Constitution and Funding Guidelines which outline all of the rules we follow when recognizing GSOs and making financial decisions. **Includes policies which GSOs must follow.**
 - Model constitution for new orgs
 - Budgets: Information regarding allocations and current spending



Important Dates

- **Fiscal Year: July 1 - June 30**
- **Final day to submit reimbursements: May 30**
- **Allocations open: 1st day of Fall classes**
- **Allocations close: 2 weeks after opening (Sept 22)**
- **Allocations determined on or about Oct 1**
- **There are no summer allocations (June 1 - ~Oct 1st)**
 - **You should spend your allocations before June 1st**
 - **Requires explicit approval of GSA EC to provide funding in this summer date range**

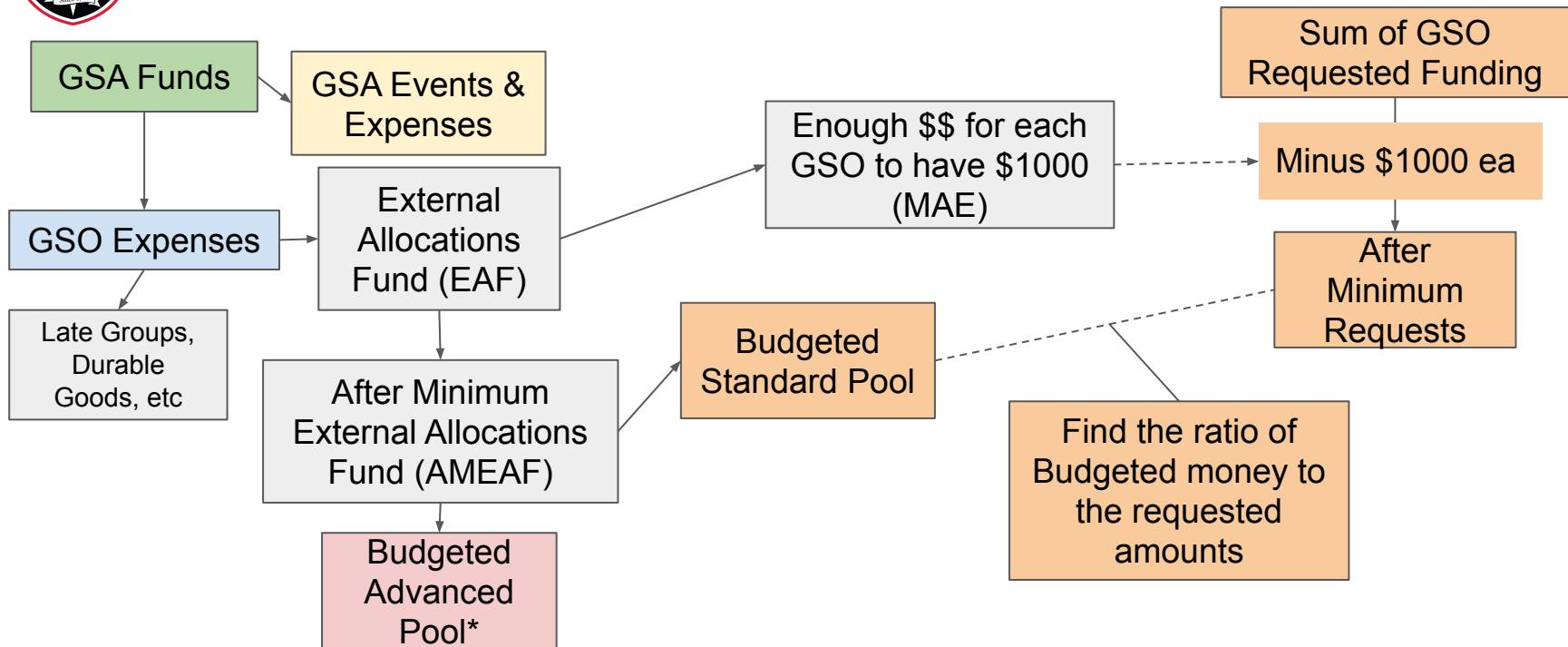


General Funding Procedures

- **GSA Works on an entitlement basis**
 - **GSOs are assigned (allocated) funds for use in a given AY**
 - **Used within GSA, University, State, and Federal guidelines**



How are allocations determined?

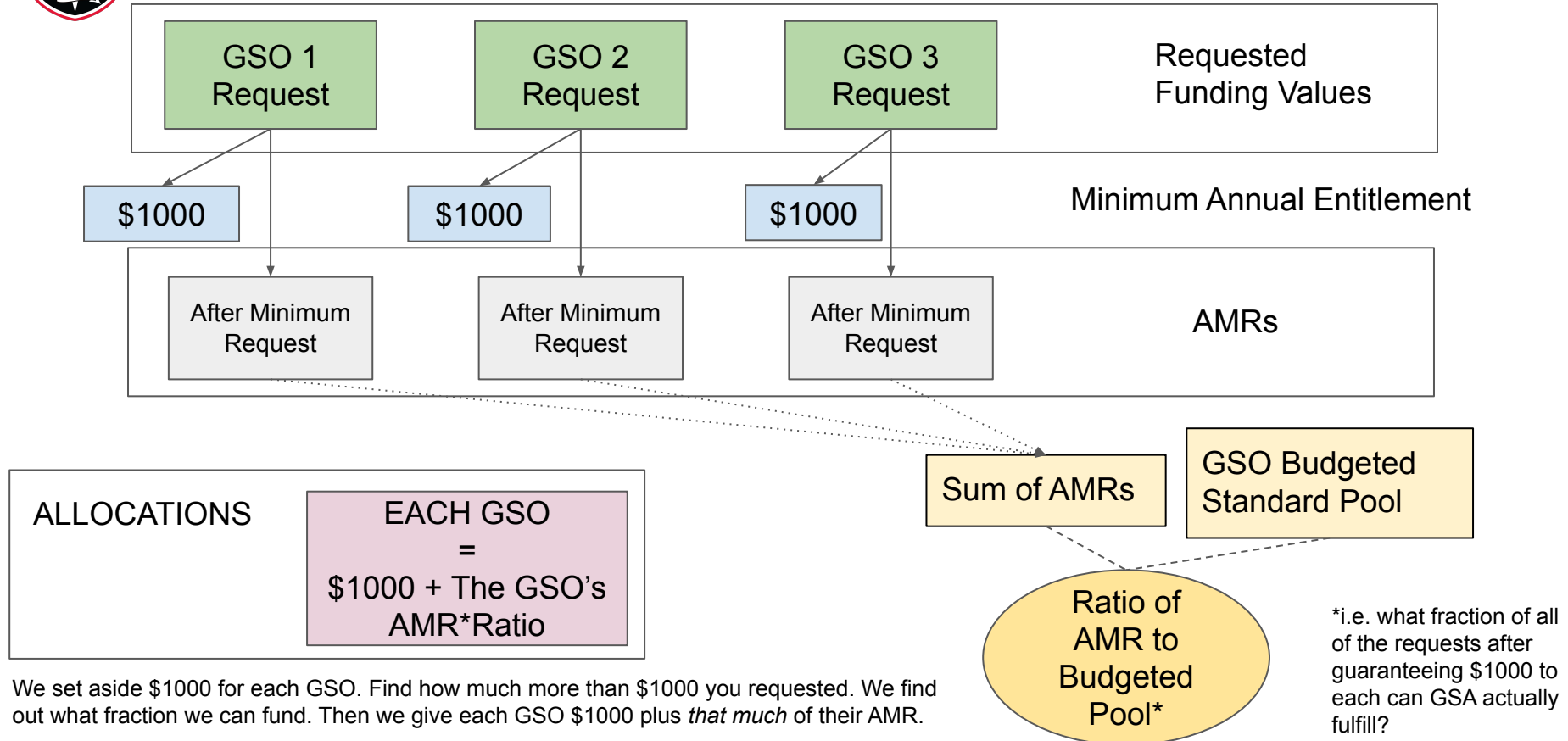


GSOs may request up to 1.5x what they spent during one of the last two academic years (maxed out at \$7500).

***No time to get into this right now. See Determination of Annual Entitlements in the Funding Guidelines.**



How are allocations determined?





Notes on submitting information

- Only electronic submissions through **getINVOLVED** are accepted
 - paper copies and physically dropping off PERs or other requests at the GSA offices is **NOT** acceptable.
 - **All correspondence regarding a submitted reimbursement MUST be through getINVOLVED**
- Must use the newest forms
 - available on GSA website
 - DO NOT rely on old forms others have used previously in your group
 - Submissions with old forms not accepted
- Must use the GSA format physical sign in sheet
 - Makeshift sheets, blank papers, your own format, getINVOLVED attendance tracking, etc are NOT acceptable.



So you want to host an event...

1. What type of event?

- a. Conference?
- b. Seminar?
- c. Speaker?
 - i. Will you request an honorarium?
 - ii. Is your speaker coming in person or virtually?
 - iii. Is your speaker domestic or international?
- d. Is it collaborative?

2. When is the event?

- e. Note on pre-allocation:

3. Where is the event?

- f. Indoor/outdoor?
 - i. How many folks? EACS approval?
- g. Do you need to reserve a space on campus?
- h. If off campus, why? **Requires explicit permission from GSA**



GSA Pre-Approval

- **ALL events**, unless exclusively virtual, **require GSA pre-approval for 2022-2023**
- Event pre-approval is NOT the same as honorarium pre-approval
 - If you are requesting an honorarium, you MUST undergo both pre-approval processes



Pre-approval (3 types)

1. **Off-campus approval**
 - a. **Needed: anytime an event is not on RU campus. No exceptions**
2. **Honoraria approval**
 - a. **Needed: for any speaker whom you want to provide an honorarium. No exceptions**
3. **Pre-allocation approval**
 - a. **Needed: May 30th - finalization of allocations (~Oct 1st). No exceptions**



Funding for events held prior to a funding application cycle

A GSO can be funded for an event held prior to a funding application cycle, but after the conclusion of the previous year's cycle (such as an orientation), if the following conditions are met.

- **The GSO holding the event has been recognized by the GSA at least once in the past two years or is applying as an academic GSO**
- **No funds for the event are in violation of any of the funding prohibitions listed in section 4.2.**
- **The total funds spent for the event are under \$1000, the GSA's guaranteed minimum annual entitlement for GSOs**
- **The GSO applies for funding for the year through the application procedures listed in 4.1.1 and finalizes their entitlement prior to submitting their reimbursement request**

If you are reimbursed for funds prior to your entitlement, that amount will later be subtracted from your total entitlement



Q: What if I miss the annual application deadline?

Late Groups Fund

- **Includes:**
 - **Pre-established groups who missed deadline**
 - **New groups**
- **Contact GSA Treasurer and Executive Council to notify of intent to submit form**
- **Recognition and funding awards on rolling basis until exhausted**
- **\$1000 entitlements**



Funding Prohibitions and Duties - Food

Food: For no event shall a GSO be allocated funding for meals greater than the following rates.

- **Snacks: \$5/attendee**
- **Meals: \$15/attendee**
- **Meals with speakers or invited guests: \$30/attendee** with a maximum of \$300 per meal for all attendees minus the speaker or invited guest.



Funding Prohibitions and Duties - Speakers

Speakers and Invited Participants: For no event shall a GSO be allocated funding for the expenses of speakers and other invited participants exceeding the following limitations.

- **\$1000 honoraria per person**
- **\$1000 per person in travel expenses to and from the event**
- **\$250 per person per night of lodging**
- **\$46 per person per day of meal expenses**

Personnel or Students of Rutgers ARE NOT eligible for honoraria.



Funding Prohibitions and Duties - Speakers

For a check to be issued to a visitor to Rutgers, the GSA may require the visitor's SSN and home address, prior to the check being written. If the visitor is not a US citizen, a passport number and the country of issue are may be required. **No checks will be issued without this information.**



Honoraria Update

- New system
 - New request form (PDF and getINVOLVED) will be posted soon
 - requires 3 (or 4) components

Pre-event

- Make honoraria request via getINVOLVED and notify via email
- GSA initiates adding speaker to system
- Speaker receives a link to fill out various information

During Event

- Event will be held as usual
- Speaker will not receive payment at time of event

Post-event

- MUST submit a PER to initiate check request for speaker
- check generated and sent by University to speaker directly



Funding Prohibitions and Duties - Absolute No Nos

- NO alcoholic beverages
- NO prizes
 - academic prizes, artistic prizes, or lottery-based prizes



Funding Prohibitions and Duties - More No Nos

- **Violations of Law or Rutgers Policies:** The GSA shall not allocate funds to any event any part of which violates the laws of the city of New Brunswick, the county of Middlesex, the state of New Jersey, the United States of America, or any other jurisdiction which is relevant to the event in question, nor shall the GSA allocate funds in violation of official policies of Rutgers, the State University of New Jersey.
- **Worship and Proselytizing:** The GSA shall not allocate funds to events involving religious proselytizing or worship.
- **Fundraising:** The GSA shall not allocate funds to events with a monetary fundraising component. This applies both to events the purpose of which is to fundraise for a GSO and events the purpose of which is to fundraise for an external body such as a non-profit organization.



Field Trips

- **Field Trips:** The GSA **will not fund** a field trip (transportation costs and cost of admission) unless the following special conditions are met.
- a. The field trip is relevant to the mission of the GSO holding the field trip.
 - b. The GSO receives special permission from the GSA Treasurer or business Manager allowing them to run the field trip. This process will take two to four weeks because the university must approve the trip.
 - c. The field trip is advertised over the GSA events list as open to all graduate students.



Off-Campus Events

- Off-Campus Events: The GSA shall not allocate funds to any events which do not take place on a Rutgers university campus or within the immediate vicinity of the campus, with the exceptions listed below.
- a. Dinners in local restaurants including an invited guest or visiting speaker.
 - b. Events which GSOs can make the case would not be possible on a campus venue.
 - c. Field trips, when they meet the conditions above.

If you expect that your event meets criteria for an off-campus event, you still must contact the EC and receive explicit approval.



Duties of Funded Organizations

Duty #1. All events for which the GSA allocates funds must be open to any and every Rutgers graduate student who wishes to attend that event. It is the responsibility of the event organizer to anticipate and accommodate graduate student interest in the event. Graduate students may not be turned away from or denied admittance to any portion of a GSA funded event for any reason.

Duty #2. All events for which the GSA allocates funds must be primarily planned and organized by graduate students and should be intended primarily for a graduate student audience. The GSA allocates funding to GSOs for the sake of empowering them to plan and run their own programming to benefit other graduate students, it does not allocate funding to them to supplement faculty, undergraduate, or “departmental” programming. In certain situations, collaborations between graduate students and other university constituencies may be acceptable provided that graduate students are centrally involved in the planning of the event and the event is of particular interest to graduate students. GSOs who are considering such collaborations are advised to inquire with the GSA treasurer whether the event would be appropriate for GSA funding.

You do not host events for your department - you decide



Duties of Funded Organizations

Duty #3. All events for which the GSA allocates funds must be adequately publicized.

Programs and Events must be publicized at least to the membership of the organization concerned. Conferences must be publicized to the entire Rutgers graduate student community through the GSA Events List at a minimum.

Duty #4. All advertisements and publicity for a GSA funded event must include a statement which announces that the event is (at least in part) sponsored by the GSA.

Duty #5. After each event which receives funding from the GSA the sponsoring GSO is responsible for providing the EC with a Post-Event Report as a requirement for receiving reimbursement. This requirement applies even if some portion of the costs for the event were paid by the GSA in advance. (See Section 4.3 for more information about Post-Event Reports and GSA reimbursement policies.)



Duties of Funded Organizations

Duty #6. Each GSO must send a representative to officially attend a minimum of six council meetings per year. A GSO receiving recognition mid-way through the year may not miss more than one council meeting from the time at which they are recognized until the end of the year. A GSO representative has officially attended a meeting of the GSA Council if they have signed the attendance sheet at the beginning of the meeting and has remained at the meeting until it is officially adjourned.

Duty #7. No GSO can open or maintain a bank account. Any existing GSO bank accounts must be converted to Rutgers accounts or to the GSA.



Special Requirements for GSOs Associated with National Organizations

- 1) Governance of the organization must be fully independent from the external organization and the GSO must stipulate in its constitution that its decision making is the sole discretion of its graduate student membership, and that the GSO aligns with the mission of Rutgers
- 2) Any advertisements for new membership by the GSO must make clear that the advertisement is for membership in the student organization at Rutgers and not the external organization
- 3) Any events or programming organized by the GSO must be full organized and planned through the GSO and all promotion for said events and programming must make clear that it is organized by the GSO and not an external organization
- 4) The official name of the GSO must include “graduate student chapter” or similar phraseology to make clear that the GSA’s recognition or support of the organization is of a graduate student organization and not an external organization
- 5) Evidence of any situation where an external organization is involved in the decision making or event organizing the GSO, in violation of these policies will be grounds for revoking the GSA’s recognition of the GSO, including any funding commitments to the GSO.

These duties are university requested and are placed with the intention of distinguishing the GSA’s institutional support for graduate students from the GSA’s support for external organizations not accountable to Rutgers.



Penalties

Funds spent in violation of any general or expense-specific funding prohibition will not be reimbursed. Events held without submission of a Post Event Form as required by Duty 5 will not be reimbursed. The GSA reserves the right to withhold reimbursement from any events held by GSOs which violate Duties 1, 2, or 3 and depending on the severity of the violation may impose more extreme penalties including the revocation of that GSO's recognition and annual entitlement, or the denial of funding for the entirety of the fiscal year following the one in which the violation(s) took place. The imposition of any penalty exceeding the withholding of reimbursement will not occur without a vote of the GSA council on the matter in question.



Reimbursement Policies

To release funds for reimbursement, the GSA must receive a complete post event form from the GSO

which ran the event. Post event reports must include:

- Original receipts for the expenses for which reimbursement is being requested
- A copy of the publicity material used for the event illustrating that the event was advertised

appropriately (see Duty 3)

- A sign in sheet reflecting the actual attendance at the event
- The signature of either the GSO's specified contact person, or an officer of the GSO
- A working contact email for the signee

Post-Event Reports must be submitted no later than 90 days following a funded event

PER Form is now on GetInvolved



Reimbursement Policies

The GSA will not under any circumstances reimburse any expenses that are in violation of the funding prohibitions or duties listed in Section 4.2. It is the responsibility of a GSO's officers to be familiar with these policies and to ensure that any student who spends money on behalf of that GSO is familiar with the policies.



What if my GSO exceeds their entitlement?

The GSA will not under normal circumstances reimburse any expenses that are in excess of a GSO's total entitlement. If a GSO finds itself in a situation such that a student in their GSO has spent funds in excess of that GSO's total entitlement, their only option is to submit a deficit request. If reimbursement of a GSO is funded through a deficit request, the reimbursement amount will be subtracted from that GSO's total entitlement in the next calendar year. Requests for \$200 or more above a GSO's total entitlement may subject the GSO to additional penalties in the next calendar year.



Durable Goods

Purchase Frequency	Once a year
Funding Source	GSO's Annual Entitlement
Status Report of Goods	Annually
Maximum Request	Discretion of GSA, case-by-case basis
Ownership of Goods	GSA

As of Spring 2022, Durable Goods come out of the GSO's annual entitlement.

However, GSA has dedicated funds toward purchasing goods that benefit many GSO's. At GSA's discretion, GSA may purchase requested goods and make them available to all GSO's on a sign-in-sign-out basic.

We do not have time to discuss exactly what qualifies as a Durable Good hence why we have an extensive pre-approval process. Reach out to treasurer or EC to find out what qualifies as a Durable Good.



Final Thoughts

Questions? Comments?

Come to our weekly office hours
EC Office hours - Tues/Wed - 9/10am

Business Manager office hours - TBD