

Graduate Student Senate University of Connecticut

Overview of the GSS Budgeting Process & Funding Guidelines

Updated December 2012

Agenda

- Introduction
- Mission Statement
- Review of GSS' General Philosophy and Guidelines
- Requirements for Eligibility
- Acceptable & Unacceptable Requests/Uses of GSS Funds
- Other Rules Worth Remembering
- Budget Submission and Allocation Process
- Anatomy of the Full GSS Budget
- Completing & Submitting Your Tier II Organization's Request

Mission Statement

The Graduate Student Senate is the primary source of funding for University of Connecticut graduate student organizations and clubs that have limited opportunities to receive funds from the University of Connecticut.

General Philosophy and Guidelines

Purpose of Events

Events funded by the Graduate Student Senate should contribute to the intellectual, cultural, and/or professional capital of the graduate student body. Preference will be given to events that have an appeal which extends beyond the members of one academic discipline.

Accessibility

Events funded by the Graduate Student Senate will be open and accessible to all graduate students. The Finance Committee, Executive Committee, and the Senate will give priority, with regard to funding decisions, to the number of graduate students that will be served by the use of Senate funds.

Non-Discrimination Policy

Organizations, groups, or individuals using University of Connecticut funds or facilities cannot intimidate, interfere, or discriminate on the basis of age, sex, sexual orientation, marital status, race, color, creed, national origin, physical handicap, or political activity.

Content Neutrality

In accordance with the University of Connecticut's Division of Student Affairs Student Activities guidelines, the Graduate Student Senate shall adhere, at all times and in all circumstances regarding funding, to the principle of content neutrality. Funding decisions will not be based on the content of the ideas being expressed by an organization, only the degree to which an event or activity will benefit the graduate student community.

Eligibility Requirements

•	University Registration	(4.1.1)
•	Compliance with Regulations	(4.1.2)
•	Attendance at Senate Meetings	(4.1.4)
•	Appropriate Event Advertisement	(4.1.5)
•	Accessibility to Graduate Students	(4.2.1)

"... The organization(s) responsible for the event must not only take all reasonable steps to physically accommodate guests, but also ensure, in so far as is practically possible, that the event be conducted in such a manner so that every graduate student who wishes to attend feels comfortable doing so."

Unacceptable Requests/Uses of GSS Funds

(See 4.2)

- Events/activities for groups that do not meet the Eligibility Requirements and/or do not conform to the principles in Section 1 of the GSS Finance Policies and Procedures
- Payments, either direct or indirect, to individuals employed by UConn and/or the State of Connecticut
- The purchase of capital equipment for a specific group (not inclusive of the entire graduate student population)
- Alcoholic beverages
- Travel for individual(s) for which the benefits will not accrue to the general graduate student population
- Intra-departmental activities (see next slide)

Additional Comments on Intra-departmental Activities

GSS will not fund events or activities that:

- Should be paid for by the department, and/or
- Have limited appeal to individuals beyond a specific academic field of inquiry, and/or
- Are of a purely social nature and do not contribute to:
 - "...the intellectual, cultural, and/or professional capital of the graduate student body," or
 - Interdisciplinary development

Other Rules Worth Remembering

- GSS will <u>REIMBURSE</u> or <u>DIRECTLY PAY</u> for expenses. However, in the majority of cases, GSS will <u>NOT</u> provide funds either in advance of, or coincident with, when an expense is incurred, unless proper paperwork is submitted ahead of time.
- Reallocation of funds between Expense Codes (2.3.3)

"Within a fiscal-year budget allocation or Special Allocation, an organization may reallocate a maximum of 10% of its total allocation among expense codes. Any reallocation beyond this amount must be approved by the Finance Committee."

 Special consideration for groups not primarily based out of the Storrs campus (4.3)

The Budgeting Process

Tier II Graduate Organizations (TIIGOs)

All TIIGOs must: (a) be registered with Student Activities Office by last day of the Fall semester to be eligible for an allocation during the subsequent FY, and (b) have two Finance POCs on file with GSS Office, as well as formal documentation of Senator, by the end of September (of the current FY).

As indicated



Budget Request Submission

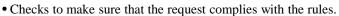
Each TIIGO & the GSS Activities Director submits a request (in the appropriate "standard format") to the GSS Treasurer for the upcoming FY.

Due by: 11:59 pm ET Jan 31st



GSS Treasurer

- Determines request amounts for Exec stipends, GSS GA, and office expenses.
- Sets limits for the maximum allowable amount that can be allocated to TIIGOs & GSS Activities, and socializes those values w/ the Budget Committee & GSS Exec Comm.



• Compiles all requests, and distributes to the Finance Committee.





GSS Fin Committee

- (1) Reviews all requests to ensure appropriateness.
- (2) Requests additional information as needed/if appropriate.
- (3) Holds budget hearings 15-30 minutes for each group; open forum modeled on Student Fee & Advisory Committee process.
- (4) Reviews input from the hearing and requests further clarification if needed.
- (5) Determines recommended amount for each TIIGO.
- (6) Informs each TIIGOs' registered Financial POCs of recommendations.
- (7) Address appeals, if necessary.
- (8) Integrates any adjustments from appeals process.
- (9) Determines final recommendations for the Treasurer to present to the Senate.





Senate

- The Senate has ultimate authority over the budget allocations.
- The GSS Treasurer will present the proposed budget presentation (during the second-to-last meeting of the school year), and answer questions (with the assistance of the Finance Committee when/as appropriate).
- The Senate may (1) modify, (2) approve, or (3) deny the Finance Committee's recommendations.

April

The Full GSS Budget

As per 2.2.1, the GSS budget will consist of allocations for:

- I. General Operations
- II. Executive Committee Stipends
- III. Compensation for the GSS Administrative Assistant
- IV. GSS Activities
- V. Special Allocations
- VI. Tier II Organizations
- VII. Unappropriated Funds

The following slides contain specific information on how to successfully complete the GSS Tier II Budget Allocation Request Workbook, which is available on the GSS website.

Instructions

- --> For additional information regarding this workbook and the fiscal year budget allocation process in general, please see the Overview of Budgeting Process and Funding Guidelines presentation and/or the GSS Finance Policies and Procedures, both available on the GSS website at gss.uconn.edu/funding.
- --> Please note, you cannot edit information directly on the *Summary of Total Request* tab. To make changes, please go to the tab for a specific event and update the information there.
- --> For each event, please make sure to include a sufficient amount of information in the *Description of Event* field so that someone who is not familiar with your organization can understand what the event/activity is about and what is involved.
- --> A description of each expense code, with examples, is included below for your convenience. You may also access this information on the Student Activities Business Office's web site at: http://www.studentactivities.uconn.edu/bo_forms.html

603	Gifts	flowers, gift cards, apparel, graduation stoles (no charge/give away items)	
604	Photocopying	copies Staples, Document Production	
605	Postage	stamps, UPS/FedEx/DHL (outgoing mail only) professional brochures/magazines, posters, business cards, letterhead	
606	Printing		
612	Advertising	newspaper/magazine ads, table tents, radio ads, program ads, bus ads	
613	Awards and Prizes	scholarships, door prizes, gift cards, trophies (drawn from a selection process)	
615	Contractual Services	DJ/band, referees/coaches, police, honorariums, web hosting, service	
620	Refreshments Events/Programs	edibles/beverages ice cream, soda, pizza, catering	
621	Supplies Events/Programs	event supplies paper plates, cups, decorations	
623	Rental	equipment, facilities/halls	
624	Travel	airfare, gas/tolls, mileage, hotels, trip/meal reimbursements, bus rentals	
625 Equipment (<\$1k)		under \$1,000 per item & included in controllable inventory	

Nearly all expenses incurred by Tier II graduate student organizations will fit into one of these twelve categories. If you have any expense that cannot be classified into one of the above types, please contact the GSS Treasurer.

Enter your organization's details here, along with the date that you submit your GSS Tier II Budget Allocation Request Workbook to the GSS Treasurer. If you know who will be the CFO and COO for your organization next year, put their names down here. Otherwise, list the current CFO and COO.

Tier II Organization Information

Name of Tier II organization: Grads Are People Too (GAPT)

Tier II Treasurer/CFO Name: Justin Case
Tier II President/COO Name: Sarah Nade

Date Prepared: 12/20/12

Is this group considered an *active* Tier II organization with Student Activities?

Does this group have two Financial Points-of-Contact registered with the GSS Office?

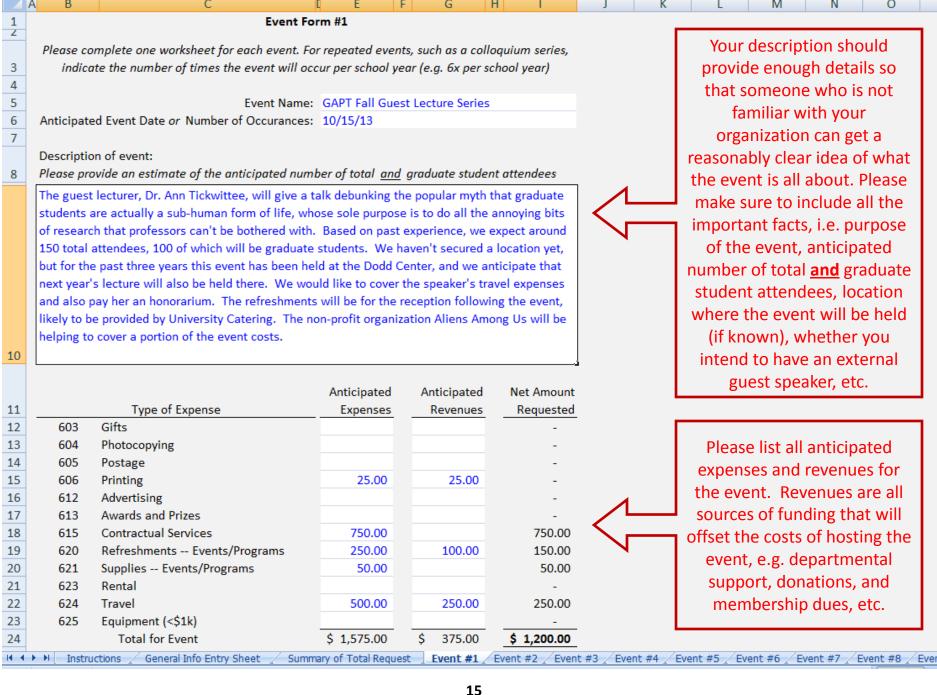
Has your group met the GSS meeting attendance requirements?

Yes

Yes

Yes

Your answers to all these questions should be "Yes". If, for at least one question, you cannot answer "Yes", your organization must rectify the problem(s) before applying for a fiscal year allocation.



Summary of Total Request

<u>Please Note</u>: You cannot edit information directly on this worksheet. To make changes, please go to the tab for a specific event and update the information there.

	Type of Expense	Anticipated Expenses	Anticipated Revenues	Net Amount Requested
603	Gifts	-	-	-
604	Photocopying	50.00	10.00	40.00
605	Postage	-	-	-
606	Printing	25.00	25.00	-
612	Advertising	-	-	-
613	Awards and Prizes	50.00	20.00	30.00
615	Contractual Services	750.00	-	750.00
620	Refreshments Events/Programs	1,250.00	100.00	1,150.00
621	Supplies Events/Programs	50.00	-	50.00
623	Rental	100.00	-	100.00
624	Travel	700.00	250.00	450.00
625	Equipment (<\$1k)		_	-
		\$ 2,975.00	\$ 405.00	\$ 2,570.00

After filling out the budget information for each event (or series of events) you plan on hosting next fiscal year, all the expense and revenue data you entered will be automatically calculated for you in the *Summary of Total Request* worksheet tab.

Questions?

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