



# **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 **REIMBURSE** or **DIRECTLY PAY** for expenses. However, in the majority of cases, GSS will **NOT** 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**

## Time Frame

### **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.
- Checks to make sure that the request complies with the rules.
- Compiles all requests, and distributes to the Finance Committee.

Jan  
|  
Feb



### **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.

Feb  
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March



### **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](http://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](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)
606	Printing	professional brochures/magazines, posters, business cards, letterhead
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?

Yes

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

Yes

Has your group met the GSS meeting attendance requirements?

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.

# Event Form #1

Please complete one worksheet for each event. For repeated events, such as a colloquium series, indicate the number of times the event will occur per school year (e.g. 6x per school year)

Event Name: GAPT Fall Guest Lecture Series

Anticipated Event Date or Number of Occurances: 10/15/13

Description of event:

Please provide an estimate of the anticipated number of total and graduate student attendees

The guest lecturer, Dr. Ann Tickwittee, will give a talk debunking the popular myth that graduate students are actually a sub-human form of life, whose sole purpose is to do all the annoying bits of research that professors can't be bothered with. Based on past experience, we expect around 150 total attendees, 100 of which will be graduate students. We haven't secured a location yet, but for the past three years this event has been held at the Dodd Center, and we anticipate that next year's lecture will also be held there. We would like to cover the speaker's travel expenses and also pay her an honorarium. The refreshments will be for the reception following the event, likely to be provided by University Catering. The non-profit organization Aliens Among Us will be helping to cover a portion of the event costs.

Your description should provide enough details so that someone who is not familiar with your organization can get a reasonably clear idea of what the event is all about. Please make sure to include all the important facts, i.e. purpose of the event, anticipated number of total and graduate student attendees, location where the event will be held (if known), whether you intend to have an external guest speaker, etc.

Type of Expense	Anticipated Expenses	Anticipated Revenues	Net Amount Requested
603 Gifts			-
604 Photocopying			-
605 Postage			-
606 Printing	25.00	25.00	-
612 Advertising			-
613 Awards and Prizes			-
615 Contractual Services	750.00		750.00
620 Refreshments -- Events/Programs	250.00	100.00	150.00
621 Supplies -- Events/Programs	50.00		50.00
623 Rental			-
624 Travel	500.00	250.00	250.00
625 Equipment (<\$1k)			-
Total for Event	\$ 1,575.00	\$ 375.00	\$ 1,200.00

Please list all anticipated expenses and revenues for the event. Revenues are all sources of funding that will offset the costs of hosting the event, e.g. departmental support, donations, and membership dues, etc.

### Summary of Total Request

*Please Note : 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)	-	-	-
	<u>\$ 2,975.00</u>	<u>\$ 405.00</u>	<u>\$ 2,570.00</u>

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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