

THE GRADUATE ASSEMBLY

2014-2015 Funding Guide



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1 General Information

1.1 Welcome

The Funding Committee (FC) has prepared this guide to help student groups understand and apply for Graduate Assembly (GA) grants and other resources. The guide details application requirements and lays out the responsibilities expected of groups if they receive funding. Read it, review it, and use it as a reference tool when requesting funds for your project or group. Most importantly, share it with other group members.

1.2 What is the Graduate Assembly?

The Graduate Assembly (GA) is the official representative body of the graduate and professional students at the University of California, Berkeley (UCB). The fundamental principles of the GA are the promotion of a vibrant student social life, inclusiveness, activism, community service, educational improvement, and professional development. In service to these principles the GA advocates for students, funds student groups on campus, and directly manages a variety of projects.

1.3 Graduate Assembly Contact Information

Graduate Assembly (GA): Located on campus in Anthony Hall

General Questions: GA Business Office (GABO)

(510) 642-2175

businessoffice@ga.berkeley.edu

<http://ga.berkeley.edu>

LEAD Center: Student Organization Advising and Leadership Development

(510) 642-5171

lead@berkeley.edu

Funding Chair: Daisy Kim

funding@ga.berkeley.edu

2 Funding Awards

2.1 Funding Committee Authority.

Any event, meeting, project, or activity which receives GA funding must welcome equally the participation of any UCB graduate student. The Funding Committee has the authority to recommend which graduate student groups shall be eligible for funding and to recommend funding allocations for each application, subject to the restrictions herein and to Delegate Assembly approval. In accordance with applicable Federal and State law and University policy, the GA prohibits discrimination on the basis of race, color, national origin, religion, sex, physical or mental disability, age, medical condition (cancer-related or genetic characteristics), ancestry, marital status, age, sexual orientation, or status as a covered veteran (special disabled veteran, Vietnam-era veteran or any other veteran who served on active duty during a war or in a

campaign or expedition for which a campaign badge has been authorized). This nondiscrimination policy covers admission, access, and treatment in GA programs, funding, and activities.

2.2 Funding Awards Categories and Deadlines

2.2.1 Categories

Graduate Meetings, Events, and Resources (GMER) Funding. Provides support for meetings and the general operations of a graduate student group.

Grants. Funds events, projects, and activities in the areas of Student Activism, Campus Diversity, Community Service, and Educational Improvement.

Contingency Funding. Provides funding for events, projects, or activities that (a) could not be anticipated and applied for in the normally scheduled funding application process; (b) occur outside the grants and GMER rounds, i.e. academic breaks from December to January or May to August; or (c) are not covered under other categories.

Publications. Provides funding for student journals and student group newsletters.

Travel Award. Provides travel funding for graduate students presenting at a conference outside of the Bay Area (nationally and internationally). The Business Office selects Travel Award recipients on a lottery system.

2.2.2 Deadlines

Travel Grants

The GA allocates Travel Award funding three times a year in rounds that roughly, but not exactly correspond to the timelines of fall, spring, and summer semesters.

Round	Deadline Dates	Timelines	Notified	Receipts Due
Fall 2014	August 21, 2014	Sep 1– Dec 31, 2014	August 28, 2014	30 days after travel date
Spring 2015	December 1, 2014	Jan 1-May 31, 2015	December 15, 2014	30 days after travel date
Summer 2015	May 18, 2015	Jun 1-Aug 31, 2015	May 25, 2015	30 days after travel date

GMER, Grants, and Publications

The GA allocates student group GMER and Grants funding twice per academic year in two rounds that roughly, but not exactly, correspond to the timelines of the fall and spring semesters. For the 2014-2015 academic year the student group funding calendar is:

Round	Deadline Dates	Timelines	Notified	Receipts Due
1	September 8, 2014	Oct 2, 2014 – Dec 12, 2014	Oct 3, 2014	Dec 19, 2014 or within 30 days of the event, whichever is first
2	January 12, 2015	Feb 5, 2015 – May 15, 2015	February 6, 2015	May 2, 2015 or within 30 days of the event, whichever is first

All receipts must be submitted within 30 days of the event or by the receipts due date (whichever is first). Late reimbursements will not be processed.

Contingency

The GA allocates student group Contingency funding on a rolling basis. For the 2014-2015 academic year, the student group Contingency funding calendar is:

Round	Deadline Dates	Timelines	Notified	Receipts Due
Summer	Rolling applications	June 7, 2014 – Oct 3, 2014	Rolling	30 days after event
Oct.	September 15, 2014	Oct 4, 2014 – Nov 7, 2014	October 3, 2014	30 days after event
Nov.	October 20, 2014	Nov 8, 2014 – Dec 5, 2014	November 7, 2014	30 days after event
Winter	November 17, 2014	Dec 6, 2014 – Feb 6, 2015	December 5, 2014	30 days after event
Feb.	January 20, 2015	Feb 7, 2015– March 6, 2015	February 6, 2015	30 days after event
March	February 17, 2015	March 7, 2015-April 3, 2015	March 6, 2015	30 days after event
April	March 16, 2015	April 4, 2015- May 1, 2015	April 3, 2015	30 days after event
Summer	Rolling applications	May 2, 2015- Oct 2, 2015	May 1, 2015	30 days after event

Late reimbursements will not be processed.

2.3 Funding Restrictions

Location:

- All projects, events, and meetings should be held on campus or within a 2-mile radius of campus when possible. If a project, meeting or event must take place outside of this area, the applicant must justify the need for an off-campus location.

Advertising and Accessibility:

- If awarded GA funding, you are required to submit your event to <http://events.berkeley.edu/index.php/calendar/sn/student.html> and print a copy of the posting in order to receive reimbursement. For further information, please see section 3.3 Advertising and Disability Services of this guide.
- All advertising materials for a GA funded event must indicate that the event is sponsored by the UCB Graduate Assembly.
- Any GA funded event must be open to all UCB graduate students and should free of a mandatory charge. If an entrance or participation fee must be charged, the applicant must justify this fee in the application
- The following text should be included on advertising material:
 - Event is ADA accessible. For disability accommodation requests and information, please contact Disability Access Services by phone at 510.643.6456 (voice) or 510.642.6376 (TTY) or by email at accessibility@berkeley.edu

Honoraria:

- Honoraria for guest speakers is limited to \$250, per person per event.
- Funds for guest travel must follow the limits set by campus policy.
- Applicants are encouraged to include a brief bio of the speaker(s) in their funding application.
- Payments are made for personal services by the GABO directly to the payee. A Personal Service Agreement (PSA) must be completed and submitted to the GABO to disburse payment for services. Blank PSA forms are available in Anthony Hall and also at <http://ga.berkeley.edu>.
- No payment can be made with cash or check(s) drawn on a student's personal account, gift cards or similar purchases in lieu of a PSA due to tax reporting requirements and will not be reimbursed by the Graduate Assembly.**

Food:

- The GA allocates funds for food and beverages at student group events and meetings based on a \$8.00 per graduate student and \$1.00 per other attendee rule. In keeping with the GA's commitment to sustainability, the GA does not provide funding for bottled water at campus events. Beginning the 2013-2013 funding year, a student group may apply for food under GMER, Grants and Contingency.

Resources and Equipment:

- Projectors, audio/visual equipment, common food preparation equipment and supplies, and common office supplies are available for student groups to borrow. In general,

student groups should attempt to minimize costs by borrowing or sharing supplies and resources with the GA or other student groups. Contact the GA for more information.

- Student groups may apply for equipment (durable goods) and other fixed capital expenditures up to but not exceeding \$250. Durable goods include all items that will be and can be reused for more than one event. This includes items such as tables, chairs, other equipment, etc.

Unused Funds:

- Any funds approved for an application which are not used within the respective funding round timeline will not be rolled over for future rounds.

Examples of funding requests **inappropriate** for any category:

- Any gifts, gift cards, or fellowships.
- Weapons, alcohol, or illegal substances.
 - Pens, paper, other office supplies that cannot be reused.
- Direct contributions to political campaigns.
- Fixed capital expenditures, such as office equipment, in excess of \$250. All goods requested must be durable goods.

2.4 Graduate Meetings, Events, and Resources Funding

Graduate Meetings, Events, and Resources (GMER) Funding provides financial support for meetings, events, and the general operations of a graduate student group. These funds can be spent on items such as food, beverages, serving supplies, and/or other meeting supplies.

Maximum award is \$500 per graduate student group per funding round. Examples of **appropriate** funding requests for this category:

- A series of scheduled on-campus events or meetings (a speaker/lecture series, seminar, colloquia, club meetings).
- A single one-time event such as an orientation, publication party, socials, or receptions.
- Food and non-alcoholic beverages for meetings and/or events, up to a maximum of \$8.00 per graduate student attendee and \$1.00 per non-graduate student attendee.
- Meeting or event materials (printing/copying flyers advertising the event; food supplies such as napkins, plates, etc). Other items not included above that are integral to the event's objective and operation.
- Office/meeting space, office supplies, stationary, miscellaneous supplies, postage & printing.
- Supplies needed for printing newsletters, displays, pamphlets, journals, or long-term projects.

FC recommendation decisions for GMER Funding are merit-blind, provided they meet the funding restrictions detailed above. The recommendations are made in a manner that seeks to allocate the available funds equitably (in proportion to student population) across all academic units.

2.5 Grants

Grants provide additional funding for larger projects in the categories of Student Activism, Campus Diversity, Community Service, and Educational Improvement. All Grant items and projects must be fully explained and budgeted, with reasonable estimates of potential costs.

Stipends, salaries, and alcohol are not fundable under a Grant and therefore will not be reimbursed. **The GA's Grant program provides up to \$1500 per graduate student group per funding round.** A single group may apply for multiple Grant projects in a single round, but the combined request cannot exceed this limit. All projects must relate directly to UCB graduate students. At least one of the Grants categories below must apply to the proposed project. If requesting more than \$1500, apply for Contingency Funding in lieu of Grants.

Proposals must include a detailed line-item budget and a one-page description of activity and justification for why the project promotes the ideals of the designated category of choice (such as student activism on the UCB campus, local, or statewide level) as well as how the project will be advertised to attract interested students. FC recommendation decisions for Grants are based on the assessed relative merit of the proposed projects with respect to the GA's funding missions (see below). Furthermore, an expensive proposed project with moderate merit will receive a lower funding priority than a proposed project with a moderate budget and equivalent or greater merit.

To help ensure that funded projects are successful, the GA strives to either award Grant applications for the full amount requested (up to the funding limit) or to deny Grant applications in full. If more applications of merit are received than the budget allows for, the funding committee may, in consultation with the applicant, recommend an award of partial funding. Any applying group is invited to make one representative available, either by phone or by email, to respond to questions or requests to modify a Grant funding application at designated FC meetings.

2.5.1 Student Activism

The Student Activism Grant category provides funding to graduate student groups who initiate projects that foster activism among graduate students on the UCB campus. The Student Activism Grant category can fund a variety of projects or events, which include, but are not limited to:

- Student protests and rallies.
- Trips to public meetings for the purpose of lobbying on UC-related issues.
- Letter or phone campaigns.
- Projects that encourage participation in UCB's student government.

All projects and events should be related to the UCB campus and community, even if there are also broader (e.g. statewide, nationwide) implications. The GA will not fund or otherwise support events or projects involving illegal or potentially illegal activities. Please see University Policy on Student Governments section 83.10 of the Funding Procedures guide.

2.5.2 Campus Diversity

The Campus Diversity Grant category provides funding to graduate student groups who initiate student service projects that are designed to benefit the educational experience of UCB graduate students by supporting diversity on a campus level, as it directly corresponds to any of the following:

- Seek the recruitment of underrepresented groups on the UCB campus.
- Promote the retention of underrepresented groups on the UCB campus.
- Enrich campus diversity by providing special services, resources, and/or events that would serve the distinctive needs of underrepresented groups.
- Organize campus events that highlight and/or target underrepresented groups.

2.5.3 Community Service

The Community Service Grant category provides funding to graduate student groups who initiate student service projects designed to improve the UCB-community relationship or assist with improving the quality of life on the UCB campus and in the surrounding community. At the direction of the Delegate Assembly, the FC particularly encourages student groups to initiate Community Service projects. The Community Service Grant category can fund a variety of projects consisting of, but not limited to:

- School tutoring and/or mentoring programs.
- Projects that offer direct services to the community (i.e. food banks, social services, etc).
- Projects to improve living conditions (i.e. Habitat for Humanity, etc).
- Programs that actively recruit UCB students to participate in community service projects.
- Legal or medical services for the needy.

All projects requesting Community Service Grant category monies must be specifically related to the UCB, Bay Area, and/or immediately surrounding communities.

2.5.4 Educational Improvement

The Educational Improvement Grant category provides funding to graduate student groups that initiate student projects designed to enhance the graduate educational experience on the UCB campus. The Educational Improvement Grant category focuses on a project's potential for fulfilling the unmet educational needs of graduate students. Applications are evaluated based on their potential to reach a broad array of students within the graduate community and the extent to which participation from graduate students is encouraged. Projects aimed at developing graduate teaching and teacher training are particularly encouraged. The Educational Improvement Grant category can fund a variety of projects such as:

- On-campus conferences and symposia.
- Film productions and festivals.
- Graduate student recruitment programs.
- Group field study and experiments.
- Educational manuals and student handbooks.
- Speaker series.
- Student-taught courses.
- Dance and music performances.
- Art exhibits.
- Graduate student job fairs.

As a reminder, the Education Improvement Grant Category does not support single license software purchases.

2.6 Publications

The Publications category provides funding for student publications, including student journals and newsletters. Publications are strongly encouraged to provide freely available digital copies online, and the GA prioritizes applications that establish or expand the online presence of a student publication. Campus resources should be exhausted before requesting GA funding for publication-related software. Professional editing services are generally limited to \$250 per

project, subject to the GA's PSA guidelines (see section 2.3 above). The FC will recommend funding awards based on the merit and cost-effectiveness of the request, including the total audience to be reached, printing cost per issue, and value to UCB graduate students.

2.7 Contingency Funding

In addition to the traditionally scheduled and requested funding categories, the FC reserves some funds each cycle for Contingency applications. This category exists to support unusual or otherwise ineligible activities that the FC deems meritorious. Examples may include:

- Events that student groups would like to hold that may not fall neatly into any of the funding categories outlined above (GMER Funding or Grants).
- Events that occur outside of the normal funding round event timelines.
- Funding requests for resources in excess of the maximum limit (the limit is \$500 for GMER Funding and \$1500 for Grants).
- Events that could not be anticipated before a round's funding application deadline (for example, an event in response to an unforeseen local/national/global incident).

In addition to the standard Student Group Funding Application, the application for a Contingency Funding award must also include a one-page description of and justification for the event, activity, or project.

Applications for Contingency Funding will be considered monthly on a rolling basis (see section 2.2.2 above). There is no upper dollar limit for the Contingency Funding award, nor is there a guaranteed minimum. Funding may be awarded partially, completely, or not at all. Delegate Assembly decisions on Contingency Funding are final and not eligible for appeal. Student groups should take care to justify not only the merit and cost-effectiveness of the proposal, but also explain why it is necessary to apply under contingency. Student groups are encouraged to provide as much detail about their proposed event as is reasonable. The FC will recommend funding awards based on the merit of the event/resource request.

2.7 Travel Award

The Travel Award provides funding to graduate students presenting at conferences taking place outside of the San Francisco Bay Area. These conferences must benefit the student's educational or research endeavors. To be eligible for the Travel Award, the student must be presenting at the conference. The application includes a section to be completed by the student's Academic Advisor, stating their support of the conference. **Each Travel Award provides \$300.**

The Travel Award program was created because the GA recognizes that a graduate student's education requires presenting at conferences and/or seminars, some of which take place in locations outside the Bay Area. Since these conference locations are out of the area, some departments may not provide full financial assistance. As a result, the GA implemented the Travel Award to assist with travel expenses associated with presenting at conferences.

Travel Award Policy. Students may only receive one award every two academic years, and there are three rounds that are funded: fall, spring, and summer. If an applicant does not receive funding, the applicant may re-apply for funding in the following rounds. Approved expenses include:

- Conference registration fees.

- Food (only for the person traveling, in destination city).
- No alcoholic beverages - if alcohol is purchased, you must request the vendor to print separate receipts.
- Lodging (in the destination city).
- Travel costs (to and from the destination city only and/or to and from the airport to the conference site/hotel).
- Airline tickets (retain your boarding passes, itinerary confirmation, and payment confirmation).
- Gas/mileage (must include map showing distance traveled).

Maximums for expenses are set by the UC Berkeley travel policy, see <http://controller.berkeley.edu/travel>.

Cancelled Conferences. If a conference for which a Travel Award was given is cancelled, the student must contact the GA immediately. Travel to cancelled conferences will not receive funding, and the Travel Award will be rescinded. The student is eligible to reapply for a Travel Award in future rounds.

Changing Conferences. If a student who was granted a Travel Award chooses not to attend the conference listed on his/her Travel Award application, even if the student attends another conference, he/she will not receive the award, and his/her Travel Award will be revoked. The student is eligible to apply for a Travel Award in future rounds.

Recipients Must be Registered Students. Only currently registered full-time graduate students may apply for and receive a Travel Award. Applicants must, upon request, provide proof of school registration during the semester in which the conference takes place. If the conference is held in the summer, the student must have been registered as a full-time graduate student during the previous spring semester.

Reimbursement. Provide original Presentation Acceptance Letter on letterhead of the conference or sponsoring university/institution, or an email confirmation of acceptance letter. Submit the original Expenditure Reimbursement Form (ERF) within 30 days of your travel. The ERF may be found at <http://ga.berkeley.edu/funding/travel-grants> or at the GABO. Attach the following documents to the ERF:

- Original conference program guide with your name and presentation listed.
- Original conference registration and receipt of payment or bank statement displaying registration payment.
- Original, itemized receipts and credit card statements showing that expenses have been paid in full.
- Original boarding passes and/or airline itinerary.

The Travel Award applies to individual students, not student groups. Applications are received on a separate schedule and undergo a separate review process from group funding. Students who advance to PhD candidacy can also apply for a one-time Conference Travel Grant from the Graduate Division, see http://grad.berkeley.edu/financial/pdf/travel_grants.pdf.

3 The Funding Application Process

Each application must be accompanied by an itemized budget, detailing the expected expenses

and their estimated costs. All projected costs must be reasonable. This budget should be included on the Budget Details pages of the Student Group Online Funding Application.

Upload

additional pages if necessary. Applications requesting more than the maximum funding limit of the appropriate categories will be rejected.

3.1 Requirements to Apply for Funding

Before a graduate student group can receive funding they must complete the following steps:

Step 1: Register as an RSO with the LEAD Center.

<http://lead.berkeley.edu/orgs/lead/registration>

Step 2: Review the Funding Guide Instructions & complete online funding workshop

Online Funding Workshop: access to workshop is now on the LEAD center website

<http://rsoquizzes.berkeley.edu/agent/>

Step 3: Verify Delegate Representation. Student groups applying for funding must be represented in the Delegate Assembly by either (a) having a GA Delegate as a member, or (b) having at least one group member whose academic unit has at least one GA Delegate.

The online application will require you to select a delegate to sponsor your application.

To verify Delegate representation or to apply to be a GA Delegate, visit the GA (Anthony Hall) or the GA website: <http://ga.berkeley.edu/delegates>.

Step 4: Funding Application Review the Graduate Student Group Funding Application and the instructions in this Guide before submitting your application. For additional questions contact the GA at (510) 642-2175 or visit the GA website <http://ga.berkeley.edu/funding>.

3.2 How to Apply for Funding

All application round deadlines, event timelines, notification dates, and receipt due dates are listed in Section 2.3 of this guide and on the Graduate Assembly website (ga.berkeley.edu). If you have any questions, please contact the GABO before the deadline dates.

Online Funding Workshop: access to workshop is now on the LEAD center website

<http://rsoquizzes.berkeley.edu/agent/>

3.3 Advertising and Disability Access Services

All advertising must clearly display that the event is sponsored by the GA and open to all UCB graduate students. Events with advertising that does not clearly display these items will not be reimbursed. See Advertising Instructions below.

If awarded GA funding you are required to submit your event/meeting/project details to <http://events.berkeley.edu/index.php/calendar/sn/student.html>. After submitting your event, print a copy of the posting, as this will be required for submission with a completed CalLink Purchase Request Forms (PRFs) to reimburse your expenses.

Advertising Instructions Required for all funded projects, events, and meetings (except the Travel Award).

1. Post your event/meeting/project at <http://events.berkeley.edu/index.php/calendar/sn/>

- student.html. Click on submit or edit an event from the left menu under the “About the Calendar” section. You need will your Cal Net ID and passphrase to log in.
2. List the title of your event, select the event type, and write a brief description of the event. Remember to include the name of your graduate student group. List the date, time, and location.
 3. Verify that Student Events is selected as the Primary Calendar.
 4. Event Sponsors: All projects/events solely funded by the GA must select Graduate Assembly as the Primary Sponsor. If there is a secondary sponsor, this may be listed in the “Other Sponsor Organization Name” text field.
 5. Use a campus or general department phone number as the contact number. This information will be posted on the Student Calendar; therefore, your personal contact number is not recommended. For questions, email advisor@ga.berkeley.edu.
 6. Administrative Options - if the general department contact number in Step 5 cannot directly answer specific event questions, you are required to type a personal contact number in this section as an “Internal Note”. Any notes posted here are only reviewed by the Calendar Administrator and are not viewable by the public. To advertise your event to the entire UCB community, you must type a note in this section. Otherwise, your event will only be posted on the GA calendar and you may skip this step.
 7. Submit posting. Your event/meeting/project requests will automatically be forwarded to the Student Calendar administrator for approval. It may take up to 5 business days to post online (usually within 1 business day). For technical questions regarding your Student Calendar posting, email the GA Advisor at advisor@ga.berkeley.edu.
 8. Print your event listing from <http://events.berkeley.edu/index.php/calendar/sn/student.html> after submission (required for reimbursement).

Disability Access Services Fund - For disability accommodation funding requests and information please see <http://access.berkeley.edu>. Please try to make your service request with as much advance notice as possible. For more information regarding funding disability accommodations you may contact the GA Advisor at advisor@ga.berkeley.edu. In addition the following text should be included on advertising material:

- Event is ADA accessible. For disability accommodation requests and information, please contact Disability Access Services by phone at 510.643.6456 (voice) or 510.642.6376 (TTY) or by email at accessibility@berkeley.edu

3.4 The Application Review Process

What is the Funding Committee? The FC comprises 6-10 GA Delegates who review submitted applications and make recommendations to the Delegate Assembly. Each member represents a separate academic department and reviews your application based on the criteria explained in the Funding Guide and the FC procedures. The FC recommends the amount of the funding to be awarded, including any restrictions. FC members are encouraged to commit at least one academic year to the committee while a GA Delegate. If you are interested in becoming a member of the FC, please contact the Funding Chair at: funding@ga.berkeley.edu.

3.4.1 Funding Committee Recommendation Decision Process

According to the GA Charter and By-Laws, and Delegate Assembly approved procedures and

policies, the FC is required to follow the guidelines presented in the Funding Guide regarding the recommendation of funding and grants to registered graduate student groups. The logistics of the process are described below:

1. On the application deadline date, applications are compiled, previewed, and prepared for the FC members by GABO staff. There are no deadline extensions.
2. The following week the FC members meet, discuss the eligibility of each application, discuss the merits of Grants and Contingency applications, and propose a monetary recommendation and possible restrictions for each application. Each member reviews applications based on the application criteria explained in the Funding Guide and the FC Procedures. Then, the FC makes recommendations to the Funding Chair regarding funding allocations.
3. The Funding Chair organizes these recommendations into the Funding Allocation Report and presents it to the Delegate Assembly at the next Delegates Meeting (usually the first Thursday of the month), where it is ratified or amended. If amended, the amended allocations are presented to the delegates for final vote. Once voted upon, the allocations are sent to the GABO for the processing of the Final Funding Report.
4. The Final Funding Report is sent to all applicants via email on the advertised notification dates. The report is also available for review at the GA (Anthony Hall) and hosted on the GA website <http://ga.berkeley.edu/funding/status>.
5. Approval by the delegates is generally final. However, in special cases, appeals are allowed.

Funding Allocation Report. Once the Delegates approve the Funding Allocation Report, the GABO notifies all applicants via email with the Funding Report. The Funding Allocation Report includes the student group, amount of funding requested, the amount of funding allocated, and any additional comments (if applicable). The report is available at Anthony Hall for review and posted on the GA website <http://ga.berkeley.edu/funding/status>. The notification dates are listed on the funding application. It is your responsibility to check the funding report allocations on the notification date.

3.4.2 Changing Your Approved Budget

The Funding Allocation Report approvals are based on the information provided in your original funding application. Therefore, the money allocated to your group must be spent on items outlined in your original budget. If your group makes changes that deviate from your funding application, you are changing your approved budget. Below are types of budget change requests:

- Change in the items purchased for your event, or a change in the amount spent on items.
- Change in the date of the event, if and only if it would fall outside the approved funding timeline.
- Change in the event content (requiring different expenses than what was listed on application).

To Change the Budget of an Event. You must request approval from the Funding Chair before purchasing items that are not approved from your original funding application. The GABO will not reimburse your group's expenses for any budget items changed that are not approved by the Funding Chair.

1. Write/type a short memo to the Funding Chair (funding@ga.berkeley.edu). In the subject line, write your Group Name and Round of Funding followed by "Budget Change Request". Example: "Graduate Student Geographers Round 3 Budget Change Request."

2. The Funding Chair will review your request and respond via email regarding the decision. You must receive approval before spending funds.
3. When filing your reimbursement, turn in the Funding Chair approval letter with your receipts.

3.5 The Appeals Process

The following is a list of situations in which funding decisions cannot be appealed:

- Applications or receipts submitted after the advertised deadline dates.
- Requests that do not comply with University or GABO policies.
- Overall percentage cuts based on serving the largest student population.
- Expenses that are not approved in the funding application (see 2 for expenses that are not approved).
- Events/projects that are not within the round timelines.
- Budget change requests that are not approved by the Funding Chair.
- The Funding Allocation Report after 7 calendar days have passed from the notification date.
- Applications denied because of off campus event locations.
- Contingency Funding applications that have been denied.

The funding appeals process is governed by the GA By-Laws:

6.7.2 Funding Appeals. Decisions of the Funding Committee to deny or limit funding to a particular Graduate Student Group may be appealed to a Funding Appeal Committee. This committee shall be convened by the Rules Chair. The membership will consist of the Rules Chair, the President (or one member of the Executive Board chosen by the President) and the Funding Chair (or one member of the Funding Committee). Appeals must be e-mailed to the Rules Chair no more than seven (7) calendar days after notification of the Funding Committee's decision. Appeals must contain the specific decision being appealed and the reasons for the appeal. Appellants shall be given the opportunity to present their case in person to the Funding Appeals Committee before a decision on an appeal is made, provided the appeal is timely. The 7 calendar days will start on the notification date listed in the funding application. Follow the steps listed below to lodge an appeal to the Funding Allocation Report:

1. Write a 1 page memo addressed to the Funding Appeal Committee.
2. Clearly outline your concerns and the resolution you are proposing.
3. Send your appeal to the GA by e-mailing it to the Rules Chair: rules@ga.berkeley.edu, President: president@ga.berkeley.edu, and Funding Chair: funding@ga.berkeley.edu.

The Funding Appeal Committee will review your appeal and respond with the next steps. Appellants shall be given the opportunity to present their case in person to the Funding Appeal Committee before a decision on an appeal is made, provided the appeal is timely.

6.7.3 Final Approval. The Funding Committee's report on funding allocations and all decisions of the Funding Appeals Committee are subject to the approval of the Delegate Assembly.

The Funding Appeal Committee will meet and discuss the merits of your case. After the meeting, the Funding Appeal Committee will make a final decision on your funding allocation. The decision is final. Seriously, don't bother appealing an appeals decision.

You will be notified via phone or e-mail regarding the Funding Appeal Committee's decision.

You may not be reimbursed for any unallocated funds until you have been formally notified of the Funding Appeal Committee's final decision.

4 Accessing Your Funds

After reviewing the Funding Allocation Report, your group may begin purchasing items approved in the report. There are 3 types of methods to pay for approved funds.

Reimbursement. Most GA funding is awarded through a reimbursement process. This means that in most cases, you will have to spend your own money up front and then be reimbursed. The two types of reimbursement available:

- **CalLink Request (CLR).** Direct payment via check to reimburse an individual once receipts and expenditure forms are completed and turned in. Then, the agent of the respective student group should be reminded to Stage 2 the request on CalLink. CLRs must be for \$25.00 or more. Checks can be held at the GABO or mailed to a payee's specified address.
- **Petty Cash (PC).** Payment via cash to reimburse an individual for general expenses that are \$24.99 or less. Cash is only available for pick up at the ASUC LEAD Center (102 Hearst Gym). The payee must present their Student ID.

Note: A requestor can combine several expenses together and submit 1 CalLink request as long as the reimbursements come from the same funding source.

Purchase Order (PO) and/or Invoice. A PO and/or Invoice are used when planning large events or conferences. They allow your group to receive goods and services without paying the vendor out of your own pocket. If you are uncertain if the vendor will accept a purchase order, ask the vendor directly if they can accept a PO from the Associated Students of the University of California (ASUC). For additional questions regarding usage, contact the GABO.

The GA can make payment (via check) to a vendor from an invoice number billed to your group or department. Vendors can be paid for the total or partial amount due on the invoice, depending on your group's approved funding.

Personal Service Agreement (PSA). A PSA is the only payment method for honoraria and other contracted services approved in the Funding Allocation Report. The PSA should be completed at least two weeks prior to the event -- this timeline will allow you to pick up the check at Anthony Hall and deliver payment to the individual on the event date. Otherwise, payment will be mailed directly to the individual after the service has been completed. Payments are never to be disbursed until after the service has been completed.

4.1 Understanding the Accounting Forms for Different Methods of Payment

CalLink Tutorial. The electronic paperwork necessary for processing reimbursements with the GABO is submitted through CalLink. Please read the CalLink Reimbursement Tutorial to learn how to use it: <http://ga.berkeley.edu/funding/callink-tutorial>.

Original Receipts. For all reimbursements, you must submit original receipts that show clearly what you bought, how many items you bought, the date that you purchased the items, and the vendor/business. If any of these are missing from the receipt, your group/person will not be reimbursed. The GABO will not accept non-itemized credit card receipts, receipts without the date or clear indication of what was bought and how much (quantity) was bought, or with no

vendor name imprinted on the receipt. If you notice that your receipt does not have the name of the business on it, ask the vendor/business to use a rubber stamp with their name applied to the back of the receipt.

Estimates for Purchase Order requests. If you are having a major/costly service provided, you may use a Purchase Order (PO). In order to get a PO, you must first get an estimate of the costs. This estimate is to be attached to a completed CalLink Purchase Request Form (PRF). Turn in the estimate to the GABO. Next, the GABO will process the PO request and provide your group with a PO slip after the request is processed. When you have the final cost from the vendor, you will submit the invoice along with the PO and the vendor will be paid.

If the vendor accepts a PO from the ASUC the GA requires the following information on the estimate before processing the PO:

- Vendor contact information (address, phone, etc).
- Description and itemized cost of products/services & taxes.

Purchase Order Form. A PO is a document used to guarantee payment once a service has been completed. When a service has been completed, an original invoice or bill (not an estimate) must be submitted to the GABO along with the CalLink Purchase Request Form. The GABO will then process payment from the invoice number provided and pay the respective vendor by check.

Invoices. Once a job/service (e.g., journal printing) has been completed, the student group member must submit the final invoice in addition to a CalLink Purchase Request Form to the GABO (who will process payment directly to the vendor). Invoices are used for events and/or services such as catering, room rentals, and printing. Invoices are primarily used in conjunction with a PO. All invoices for catering must include the Tax ID#. The Tax ID# is not required for other types of invoices. The payment of the invoice number will be in the form of a check and is mailed directly to the vendor's address provided on the invoice.

Personal Service Agreement and Resume. The PSA is the only way to process payment for any type of honoraria. It may be used for some services such as entertainment, editing, graphic work (recall that the maximum funding for honoraria is \$250 per person per event).

The PSA is completed by the graduate student group sponsoring the event/project and the person providing the service. The PSA is accompanied by the CalLink Purchase Request Form and a resume of the individual providing the service. The GA/ASUC will then issue payment and the individual is subject to tax reporting at the end of the year.

The resume must have the following items clearly typed: first and last name, address, contact phone number, and email.

At the bottom left corner of the PSA, the individual rendering service must: 1) sign 2) provide their personal address (business address only accepted if using a US Tax ID#) and 3) Social Security Number (SSN), Tax ID# or complete a W-9 form.

If a Social Security Number or US Tax ID# cannot be provided, a copy of the current passport, visa, I-94, and work permit are also required.

Without the items listed items above, the PSA cannot be processed.

W-9 Form. Taxpayer Identification Number and Certification form. This form is available at the GABO and is required for all caterers who have not worked with the Graduate Assembly in the past.

4.2 Troubleshooting

If something is wrong with your CalLink Purchase Request Reform, you will be notified as soon as possible. A message will be left with the person who filled out the form. It's extremely important that you return the calls as soon as possible so that your request can be immediately processed. Please take note of the caller's name and the time, as graduate student group accounts may be assigned to different student workers. If we have all the information, we can assist you expeditiously.

5 Frequently Asked Questions

1. If I receive funding from several programs, can I submit one Purchase Request through CalLink to cover all costs?

No. Submit separate requests and select the appropriate program from the drop down menu.

2. Do I have to spend my funds on items that are in my budget?

Yes. However, minor changes that amount to less than \$10.00 per line item will be accepted by the GABO. Any line-item change over \$10.00 must be approved by the Funding Chair or Funding Advisor.

3. Do the GA and University have similar funding cycles and/or requirements?

No. Often people combine and confuse GA student group funding requests with similar University funding programs. The University also requires original receipts and separate documentation. Please separate these requests and funding allocations. Please do not have your department pay for a request and then ask us to reimburse your department. The process is long and tedious and is not always resolvable, especially since our accounting is completely separate from the University.

4. What if I don't spend all my funds?

The GA does not hold accounts for groups, but allocates money to be used in the round that it is awarded. Once allocated funds, it is up to you to spend all your money. Any funds approved in your application which are not used within the respective round event timeline will not be rolled over for future rounds.

5. Can I get an update on how much money I have remaining in my allocation?

Yes. The GABO tracks all funding allocations. You may contact the GABO for this information, or access the account balance on CalLink.

6. Is a Purchase Order a payment?

No. A PO can be compared to a promissory note that has financial backing. The PO itself is not the actual payment. It is essentially an agreement to pay the vendor once the service/product is rendered. The estimated invoice is required to process the PO slip, which is a promise to pay the vendor given the estimated service charges. A final invoice must be submitted to ensure actual payment is made.

7. How long will the GA hold my PO, check request, or petty cash?

For POs, the rule of thumb is to submit your PO prior to your event. However, if an event has already taken place, then ask the vendor to provide you with an invoice. The GABO will cancel any outstanding POs at the end of each semester. The GABO will notify you when your check or petty cash is ready for pick up; in fact, the GABO will notify you at least three times. If, for whatever reason, you can't pick up your check from Anthony Hall, please notify businessoffice@ga.berkeley.edu and request the check be mailed. Petty cash is kept at the LEAD Center Front Desk, 102 Hearst Gym and cannot be mailed. Any outstanding petty cash that is over 6 months old will be turned over to ASUC/AUX Financial Services.

8. How can I receive a cash reimbursement and where do I go to pick it up?

Cash reimbursements are only available if your total expenditures are less than \$25.00. Cash must be retrieved from the LEAD Center in Hearst Gym 102 within 6 months of the issue date.

9. Does the GABO accept credit card receipts alone?

The GABO does not accept non-itemized credit card receipts. The GABO cannot discern the purpose of claimed expenses when provided non-itemized receipts. You must turn in the original credit card receipt accompanied by the itemized receipt from the vendor. Both must be accurately dated, itemized, and include the company name on it. All original receipts turned in must be clearly itemized by the company (not handwritten by a student group representative turning in the forms). If it is a register receipt, it must have the company name stamped on it.

10. Can a colleague pick up my reimbursement?

The individual who is getting the reimbursement is the only person that is allowed to pick up the reimbursement regardless of who filled out the form. If the reimbursement is made to the group or vendor, only members whose names appear on the funding application may pick up the reimbursement.

11. What is the reimbursement policy for gas/mileage/transportation reimbursements?

Starting 1/1/2015, please include a copy of MapQuest, Google Maps, etc. directions for mileage calculation. We will use the IRS approved mileage rate of 2015 when using a personal car for travel or if the reimbursement comes from Programs & Events money. The current IRS mileage amount is \$0.56/mile.

12. What is the reimbursement policy for tipping reimbursements?

Tips have a suggested cap of 20% of the total bill. For anything above 20%, please provide a written justification.