Committee Members:
Jeffrey Dwoskin (chair), *GSG Treasurer*
Kellam Conover, *Classics Rep*
Christopher DeCoro, *Computer Science Rep*
Aleksander Donev, *GSG Social Chair*
Nicole Esparza, *GSG Chair*
Christiane Meyer, *Ecology & Evolutionary Biology Rep*

The GSG Assembly formed this taskforce at the August 11, 2004 meeting and charged us with answering the following questions:
1. How should funds in the GSG Annual Budget be distributed between co-sponsored events and (solely) GSG Initiated social events?
2. Should the GSG Annual Budget be increased? If so, how?
3. Assembly spends valuable time debating the approval of relatively small amounts of money for co-sponsorship. Can this be changed by formation of a separate committee or by another means? Give recommendations.

We have carefully considered these, and other related matters and have prepared this report of our recommendations for the Assembly. This information was presented at the November 10, 2004 Assembly meeting.

**Goals of co-sponsorship**

As a starting point, we have agreed that it is an important task for the GSG to co-sponsor events for graduate students.
1. We want to encourage grad students to socialize and engage each other outside of their academic departments. Events we fund should always be open to all grad students.
2. We want to encourage diversity of events.
3. We want to protect small groups because some sources of funding often will not handle small requests.
4. Co-sponsorship helps advertise the GSG to the student body, and adds another reason for grad students to get involved in both the GSG and student groups.

**Question 1: Division between GSG events and co-sponsorship**

In the 2003-2004 fiscal year, we budgeted $3250 for our events and $2640 for co-sponsorship. We decided to allocate a larger portion to co-sponsorship for two reasons. First, it is only reasonable to expect the social chair to organize three large events per year. Second, student groups help make the money go a longer way since they organize the events and provide a variety of events. Therefore, we recommend budgeting $2000 for the GSG events, roughly divided into: $700 for a fall event, $700 for a spring/valentine’s day event, and $600 for a summer event. The remaining funds, currently about $4000 should go to co-sponsoring other student groups.
Question 2: Increasing the GSG’s Annual Budget

We would like to give more to other groups as co-sponsorship, which requires an increase of the annual budget. The only way to do this is to increase the fees or find other income. While our current levels of support for student groups appear to be useful, we are rarely able to give as much as requested, especially for large events. We feel that if more funds were available, it would help encourage more events from current and even new student groups.

We don’t think it is unreasonable to ask grad students to give a few dollars more to the GSG per year. For perspective, we collect $5 while our peer institutions, such as Brown, Columbia, Cornell, and Dartmouth, collect over $30. However, gathering support for a referendum will require a lot of effort.

If Assembly supports a referendum, we recommend an increase of $1 per year, for 5 years to get to $10, followed by 3% increase per year from then on. By phasing in the increase, it gives us time to put the money to good use, and the current students won’t feel that the increase is too large or too sudden.

Question 3: How to allocate co-sponsorship funds to groups

Currently we do not have any predefined guidelines for how to arrive at a fair amount to fund any particular event.

Monthly funding allocation

We recommend using a monthly system rather than the original system of 4 month terms with early requests. The annual co-sponsorship budget would be divided equally among the 12 months of the year. Requests will be heard at each Assembly meeting for events that occur between that meeting and the next meeting, using the portion of the budget allocated for that month. Any surplus or deficit in the co-sponsorship for the month will roll over to the next month.

The monthly system is simple and helps spread our co-sponsorship funds more evenly over the course of the year. This is advantageous since having events spread out, instead of occurring at close to the same time, makes it easier for grad students to attend more events.

The greatest change is that there are no more early requests. The original system was designed so larger recurring events that are planned in advance can be funded early and considered together. In practice, few events were considered early, and more importantly, the remaining regular requests took considerable time to discuss.

Funding committee

Assembly, rather than a separate committee, should make funding decisions. We recommend that assembly approves a set of guidelines, based on which the Treasurer makes funding recommendations on a monthly basis. The guidelines described below were designed to reflect the goals of GSG co-sponsorship. Once the guidelines are agreed upon by Assembly, there should be little reason to discuss these same issues repeatedly at each meeting.
Guidelines for funding requests

These guidelines are based on the (unfortunately realistic) assumption that co-sponsorship money is limited and we will not be able to fully fund all requests. The key idea is that the treasurer computes a base amount for each request based on the following guidelines. The taskforce’s recommendations are based on our experience with past requests, and we tested the guidelines with some examples from the past year. The guidelines give similar results to what was actually awarded to groups.

Size
Each event is classified based on the approximate size of the event and there is a fixed base funding amount for each category. Groups are requested to form their estimate based on the number of graduate students.

- Very small – around 50 people: $100
- Small – around 100 people: $175
- Medium – around 150 people: $225
- Large – around 200 people: $250
- Very Large – more than 200 people: $275 or $1 per person, whichever is larger

The Treasurer recommends what size to consider each event, and Assembly may always choose to modify that recommendation. We choose flat funding amounts within each category because, most of the time, even the organizations running the event cannot predict exactly how many people will attend. So an event that will likely fall between 75-125 people should be considered Small, while an event expecting between 125-175 people would be considered Medium.

Frequency
In order to encourage diversity of groups, we will reduce the base amount by 10% if a group has already been granted funding for an event that occurred within the 6 months prior to the event being considered. Furthermore, we want to limit the total amount any group can receive per fiscal year to 20% of the total co-sponsorship budget. We feel it is unfair to let any single group use a disproportionate share of our limited funds.

Other Factors
We considered other factors such as the type or character of an event, the amount requested, amount budgeted, other sources of co-sponsorship, etc. Many of these are unreliable or do not lead to consistent methods for funding events. For example, if considering the character of an event, every event will likely have worthy reasons it should be funded more. Assembly may separately decide that some event should not be funded at all by the GSG, however when deciding on funding amounts, it is not a practically useful criteria.

Differences between available funds and proposed amounts
The treasurer will scale down the proposed amounts for all requests proportionally if the total will exceed the funds available for the month. If we do not allocate all of the available funds in a given month, the rest will be rolled-over to the following month. If Assembly decides to allocate additional funds in that month, the deficit will also roll-over.
Procedures for considering requests during Assembly meetings

Hearing Requests
At each regular Assembly meeting, we will hear requests for any events that occur between the current and the next meeting, using the money allocated for that month. Groups are permitted to bring their requests to an earlier meeting, in which case they will be considered with the funds from the earlier month. However, Assembly may choose to postpone such early requests.

In order to be heard, all requests must be submitted within the timelines set by the by-laws and standing rules, currently 2 weeks prior to the meeting. Any requests submitted after that date should not be heard and the Treasurer should not ask the Assembly to override these deadlines. The Treasurer needs this time to gather information about the requests and present them to Assembly before the meeting. If there is time before the event takes place, the late request can be heard at the following Assembly meeting.

Requests will not be considered after the event has taken place. Our rules state that the GSG must be advertised as a co-sponsor of the event, and this cannot be done after the fact. As a reminder, all co-sponsored events must be open to all graduate students, and receipts must be submitted to the Treasurer within 3 months of the date of the event.

Voting
Officers of a group requesting funding, who carry a vote on funding requests (as Assembly members, proxies, or otherwise), are encouraged to abstain from voting on their group’s request. However, they should still participate in the discussion.

Multiple dates/events
Events that span multiple dates should be considered as a single request when they occur on consecutive days or would be heard in the same month. For example, a festival that takes place over the course of a week, or a series of movie nights on two Thursday nights. In this case the size of the event should be based on the number of unique graduate students attending the event. If 75 students are expected the first day and 50 the 2nd day where 25 students will attend both days, the event should be considered as 100 students. If similar events are repeated such that they occur in different months, or a group has two different events in the same month, they should be considered as separate events. The Treasurer will recommend whether or not events should be heard as one request.

Quorum
If funding requests cannot be heard at an Assembly meeting, which most frequently occurs due to lack of quorum, they should be considered at the next Assembly meeting. The requests will be heard along with new requests at the later meeting and the unspent funds will have rolled-over. Since funding is contingent on the GSG being advertised as a co-sponsor, the groups whose requests would have been heard should advertise the GSG in anticipation of receiving funding. This is the only case when it is acceptable for groups to do so before funding is granted.

Allocating additional funds
In the past, it often happens that some months are more heavily loaded with requests and other months have few or no requests. In general, rolling over funds from month to month should alleviate this inequality, and to some degree, we want to spread out the money and thus scale back spending in heavy months. However, we do not want to scale back to such a degree that significant co-sponsorship funds are left unspent at the end of the year when groups could have used that money. Consequently, there will be times when Assembly should choose to spend more than the amount allocated for that month.
Our recommendations do not address precisely how and when Assembly should increase the spending for a given month. We simply provide guidelines for how the funds allocated in a given month should be divided amongst the requests under consideration. Therefore, Assembly should adjust the total funds for the month as they see fit and then follow our guidelines. Aside from considering the size of an event, Assembly should avoid adjusting the funding of individual requests.

End of fiscal year
A slight variation is required at the October meeting. Our fiscal year is from Nov 1 through Oct 31. Requests heard at the October meeting will cover the ending fiscal year (2nd Wednesday in October through Oct 31) and the new fiscal year (Nov 1 through the 2nd Wednesday in November). Therefore, we recommend hearing these two sets of requests separately. The October events will be considered using a ½ month’s share of the ending year’s co-sponsorship budget. The November events will be considered separately using a ½ month’s share of the new fiscal year’s co-sponsorship budget.

Examples

Example 1: One request, $333 available for the month

<table>
<thead>
<tr>
<th>Group</th>
<th>Event</th>
<th># grad</th>
<th>Size</th>
<th>Base</th>
<th>$ this year</th>
<th>Funds past ½ year</th>
<th>-10% Scaling</th>
<th>Requested</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>Panel Discussion</td>
<td>90</td>
<td>Small</td>
<td>$175</td>
<td>$150</td>
<td>Yes</td>
<td>$158</td>
<td>None</td>
<td>$300 $158</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Surplus</td>
<td>$176</td>
</tr>
</tbody>
</table>

In the first example, there is one request and the group estimates that 90 grad students will attend. The event is classified as Small and therefore starts with a base funding amount of $175. The group has had another event in the last 6 months, therefore 10% is deducted, bringing the proposed amount to $158. The group has not reached the yearly limit. Since the total proposed amount ($158) is less than the available funds for the month ($333), no scaling is necessary.

Example 2: Three requests, $333 available for the month

<table>
<thead>
<tr>
<th>Group</th>
<th>Event</th>
<th># grad</th>
<th>Size</th>
<th>Base</th>
<th>$ this year</th>
<th>Funds past ½ year</th>
<th>-10% Scaling</th>
<th>Requested</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Movies</td>
<td>350</td>
<td>Very large</td>
<td>$350</td>
<td>$150</td>
<td>Yes</td>
<td>$315</td>
<td>0.52*315 = $164</td>
<td>$500 $164</td>
</tr>
<tr>
<td>B</td>
<td>Pizza</td>
<td>150</td>
<td>Medium</td>
<td>$225</td>
<td>$0</td>
<td>No</td>
<td>$225</td>
<td>0.52*225 = $117</td>
<td>$300 $117</td>
</tr>
<tr>
<td>C</td>
<td>Poetry</td>
<td>30</td>
<td>Very small</td>
<td>$100</td>
<td>$0</td>
<td>No</td>
<td>$100</td>
<td>0.52*100 = $52</td>
<td>$150 $52</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td>$675</td>
<td>$640</td>
<td>$333</td>
<td>$950</td>
<td>$333</td>
<td></td>
</tr>
</tbody>
</table>

In the second example, there are three requests. The base column is based on the size of the events. Event A (Movies) is scaled by 10% because it had an event funded in the last 6 months, while the others have not. None of the groups have reached their yearly limit. If we were to fund using these base amounts, the total would be $640, however only $333 are available for the month. Therefore, we must scale each amount by 52%, and the proposed amounts in the last column add up to the $333 that are available.