



June 28, 2013

Prof. Guangming Yao
Clarkson University
Department of Mathematics
Potsdam, NY 13699-5815

Dear Prof. Yao:

The Review Committee for the NSF Grant DMS-0846477 “Regional Undergraduate Mathematics Conferences” (RUMC) is pleased to inform you that you have been awarded \$1600 to help support your conference at Clarkson University. We are excited to be able to offer this opportunity and will work with you throughout the process to ensure its success. In this packet you will find a number of documents which we hope will explain the reporting and reimbursement process, and also provide support as you attend to the logistical and programmatic details of your conference.

We appreciate your efforts in organizing and running a regional undergraduate mathematics conference (RUMC). We realize that doing this takes time and often does not come with appropriate recognition.

We are pleased to offer you the following amounts to support your RUMC.

Student travel: \$500

Student subsistence: \$700

Invited speaker’s travel costs: \$400

In each category this is the maximum amount you may request reimbursement for. These limits are strict and are necessary in order for us to adhere to stipulations in the NSF grant and to maintain a sound budget. If you have any questions, please contact Michael Dorff (mdorff@math.byu.edu).

There will be a RUMC luncheon at the 2013 MathFest Meetings. This will occur on Thursday August 1 from 12:00 – 1:30 pm in Conference Room 4 in the Marriott Hotel. During the luncheon we will discuss some ideas related to organizing and running an RUMC such as helping students give better talks, organizing career or grad school panels, finding great plenary speakers, and finding funding to support undergraduate research. If you are interested in attending, please send an email to Michael Dorff (mdorff@math.byu.edu) by July 15.

Please make sure you discuss any changes to your budget with us before requesting reimbursement. Our support from NSF is restrictive with regard to the amount we can award for various purposes. If you find that your conference is more successful than you anticipated, please contact me and we will consider amending the support level.

If you have not already done so, please send us the URL of your conference’s website so that we may link to it from the RUMC site. We also remind you that we are happy to publicize your conference through the MAA Liaisons in your section. Please provide us with appropriate text or an electronic ad.

As a reminder, your MAA Seaway Section contact person is Gary Raduns, who can be reached at raduns_gary@roberts.edu if there is anything you might wish to discuss regarding student activities.

The NSF requires that you acknowledge their support for your program on any advertising you do, including websites. Here is a possible wording for that acknowledgement:

"Funding for [my conference] is provided by NSF grant DMS-0846477 through the MAA Regional Undergraduate Mathematics Conferences program, www.maa.org/RUMC."

As an advocate of student involvement in mathematics, you may be interested to learn that the MAA's Committee on Undergraduate Student Activities and Chapters (CUSAC) provides a limited number of travel grants for students presenting papers at MathFest. Students are encouraged to attend and participate in the national meetings. Additional details may be found at www.maa.org/students.

The MAA has materials available for your conference that could be given to attendees and presenters as part of a conference packet. These materials include:

Decals, pencils, and tattoos promoting mathematics
MAA key-ring flashlights (for student presenters only)

Please send your requests by e-mail to Anne Baer at abaer@maa.org to let her know the approximate number of student attendees, student presenters, your mailing address, and the date by which you need to receive the materials.

Finally, I remind you that your report and all requests for reimbursements are due within forty-five days of the end of your conference. Your prompt response will help us prepare our reports and ensure funding for other conferences. Be assured that the committee looks favorably on proposals from conferences that in the past have made efficient use of the funds that were awarded.

The MAA RUMC Program congratulates you.

Sincerely,

A handwritten signature in black ink, appearing to read "Michael Dorff". The signature is written in a cursive, flowing style with a long horizontal stroke at the end.

Michael Dorff, Program Director

June 28, 2013

Professor Guangming Yao
Clarkson University
Potsdam, NY 13699-5815

Dear Prof. Yao,

With this Memorandum of Understanding, the National Science Foundation-Regional Undergraduate Mathematics Conferences (NSF-RUMC) Grant Committee, through the MAA, confirms its intention to provide support for your conference at Clarkson University on March 14-15, 2014. It is assumed that you will perform the role of Conference Project Director for this conference. Your funding from the NSF-RUMC program is \$1600. Relevant documents are attached. Please sign and return this document to the MAA no later than thirty (30) days from the date of this letter, or thirty (30) days before the beginning of your conference, whichever is earlier.

Your program is part of the MAA Regional Undergraduate Mathematics Conference Program, funded by the National Science Foundation Grant DMS-0846477 (CFDA No. 47.049). The success of the NSF-RUMC program depends on experienced and enthusiastic faculty who share the view that an important component of the education of undergraduate mathematics majors is the development of the type of communications skills that these Undergraduate Mathematics Conferences provide. It is understood that any NSF-RUMC supported conference will include, as a major component, the opportunity for undergraduate students at all levels to discuss their independent work in any area associated with mathematics, its applications, its history, or its education.

Conference Project Director are responsible for implementing all aspects of their proposed program in accordance with all applicable provisions of the administrative requirements and cost principles in 2 CFR-215, 2 CFR-220, 2 CFR-230, and NSF GC-1 to the latest update, included here by reference, providing adequate documentation of expenditures, as detailed in the above federal guidelines, facilitating the evaluation process for participants, and submitting a conference report. These expectations are described below in more detail, as well as in the accompanying NSF-RUMC Director's Handbook, where you will find copies of the relevant forms.

Acknowledgement of the contribution of the MAA and the NSF: Conference Project Director must acknowledge in any advertising, on all program handouts, and on the local program website that the program has funding through the MAA NSF-RUMC (NSF Grant DMS-0846477).

Advertising for the Program: If you choose, the MAA can post an announcement for your conference on the MAA RUMC webpage. We can also send an announcement of your conference to MAA Liaisons in your region. To take advantage of these options, you will need to supply the URL for the conference's website so we can add the link to the description on the

MAA RUMC site. Please also provide a link from your site to the MAA RUMC site www.maa.org/rumc. Your website, as well as any other advertising material you generate, must acknowledge that the program is an MAA NSF-RUMC sponsored activity, funded by NSF Grant DMS-0846477.

Program funding and reimbursement of expenses: MAA disburses all grant funds on a reimbursement, direct billing, or direct payment basis. This means that an expense has to have been incurred before grant funds can be requested. All expenses that fall within the approved budget will be paid directly by the MAA upon receipt of an invoice itemizing the expenses. The MAA will only reimburse expenses up to the amount of the approved budget. Report any unreimbursed expenses as cost sharing; these should be documented in the same manner as expenses for payment or reimbursement. **Typically we reimburse institutions directly for all approved conference-related costs upon receipt of an invoice itemizing the RUMC expenses.** Alternatively, you can forward us bills from your conference vendors (caterers, etc.) for direct payment from your grant. As an exception, we can also reimburse individual students or speakers for their out-of-pocket travel expenses, but we strongly recommend you to issue any payments to individuals internally and then summarize their costs in your institutional invoice to the MAA.

Reimbursement for Expenses: All requests for reimbursement or payment of expenses are to be submitted as an institutional invoice to the MAA. The invoice should mention the MAA RUMC grant and a reference to your conference; it should be authorized for payment by the Conference Program Director, and then sent to the MAA Programs and Services Department. If you want MAA to issue payments directly to vendors or individuals, please contact the MAA Programs and services staff for further details about such payments. All requests for reimbursement must be received by the MAA within forty-five days of the conclusion of the conference. Any requests for an extension must be made within thirty days of the conclusion of the conference.

Communication with participants: The Conference Program Director is responsible for notifying all likely conference participants to provide them with relevant conference information. This is typically handled through email. The Conference Program Director should also inform participants of the logistical arrangements for the conference including travel arrangements, local transportation, housing, and meal plans.

Local arrangements: The Conference Program Director is responsible for making all local arrangements for the conference. To assist with the logistical arrangements, the MAA has prepared a planning guide, which can be found in the Program Director's Handbook. The Conference Program Director should attend to all logistical needs of the conference including, but not limited to: identifying members of the campus and local community to be involved with the conference, and in what capacity; identifying important regional resources (people, places, etc) that will contribute to the success of the conference; reserving appropriate meeting space; making arrangements for food, lodging, and local transportation; and ensuring that all costs are within the approved budget. We recommend that you recruit some of your students to help during the conference (to handle registration, pass out materials, make sure catering has arrived on time, make photocopies as needed, etc).

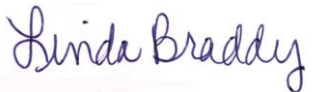
Evaluation activities: The Conference Program Director will conduct an evaluation of the conference. RUMC Director's Handbook has a sample questionnaire that can be used to for evaluation purposes and for collecting participants' demographic data. It should be completed by each conference participant at the conclusion of the conference. These questionnaires should be reviewed by the Conference Program Director and summarized for the MAA On-site Report.

Reports: All reimbursement requests and the electronic On-site Report should be submitted to the MAA within forty-five days of the conclusion of the conference.

On behalf of the NSF-RUMC Grant Committee, we are pleased that you have proposed this conference and will make every effort to ensure that your conference is a successful one. If you have questions, especially about your budget or the reimbursement process, or want to discuss details, e-mail or call the MAA Facilitator, Olga Dixon, at odixon@maa.org, or (202) 387-5200. Questions can also be directed to Michael Dorff, RUMC Program Director, at mdorff@math.byu.edu.

This communication constitutes a Memorandum of Understanding between Clarkson University and the MAA for NSF grant DMS-0846477. Please sign and date below and return an electronic or a hard copy to:

Olga Dixon
odixon@maa.org
The Mathematical Association of America
1529 Eighteenth Street NW
Washington, DC 20036



MAA Deputy Executive Director

June 28, 2013

Greg Slack
Director of Research
Clarkson University

Date

Attachment:
Program Director's Handbook



Regional Undergraduate Mathematics Conferences
Conference Program Director's Handbook



NSF Grant DMS-0846477

Updated June 2013

Mathematical Association of America
National Science Foundation
Regional Undergraduate Mathematical Conferences

Conference Program Director's Handbook

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Overview of the Program

The goal of the Mathematical Association of America's Regional Undergraduate Mathematical Conferences (RUMC) program is to increase the number and quality of undergraduate conferences that provide opportunities for students in the mathematical sciences to make presentations in a supportive and non-threatening atmosphere. Presenting a talk at a conference is an excellent way for students to practice oral communication of mathematics and to network with other undergraduate students interested in mathematics. This is an important skill for a mathematician, and an area that is getting increasing attention in educational requirements in colleges and universities. Professional organizations are also encouraging the communication aspects of the training of mathematicians. The NSF, through its REU and VIGRE programs, is also encouraging students to participate in mathematical research and communicate their mathematical ideas.

Students in the mathematical sciences who attend but do not present papers also benefit by seeing that undergraduates can successfully pursue independent study in mathematics. Mathematics students, unlike those in the natural sciences, have not typically been encouraged to think that mathematical research is an undergraduate activity. Having the opportunity to see undergraduates report on their research will inspire others to become involved in research themselves and will demonstrate to faculty the capabilities of serious undergraduate students.

Undergraduates are encouraged to make presentations at many of the section meetings of the Mathematical Association of America (MAA), the National Conference on Undergraduate Research, the Pi Mu Epsilon Undergraduate Mathematics Conferences, the annual Joint Mathematics Meetings, and the MAA summer meeting, MathFest. However, these meetings

often require extensive travel arrangements and financial expenditures and, hence, cannot offer the majority of the mathematics undergraduates the special kind of opportunity that could be available at a regional undergraduate mathematics conference. Having numerous regional undergraduate mathematics conferences held throughout the country gives the opportunity to many undergraduate mathematics majors to meaningfully participate in a conference, especially in those sections that encompass a large geographical area. Presenting papers at a regional conference increases students' confidence in their mathematical abilities, making it more likely that they will enter a mathematics graduate program or choose a career in the mathematical sciences.

This goal of the program is accomplished by providing a simple and efficient method for institutions or groups of institutions to obtain the external funding, direction, and support that is necessary to run a successful undergraduate mathematics conference. Faculty members at institutions interested in organizing an undergraduate mathematics conference can complete a brief application form and send it to the MAA. The RUMC Grant Committee will review all applications and determine the level of funding awarded to each applicant. The Committee and the MAA will also offer assistance in running and advertising the conferences through the MAA's resources such as FOCUS and MAA Online, the Pi Mu Epsilon Journal, the Pi Mu Epsilon web site, and the MAA's e-list of more than 1,600 mathematics faculty department liaisons.

The grant has specifically been written to encourage innovative programs that will suit the geographic location of the institution hosting the conference. For example, some MAA sections currently sponsor a student conference in conjunction with their regular MAA meeting. The grant will encourage these dual meetings, since availability of a small amount of funding may permit

the sections to expand these activities. For example, a section might add to their program and invite one or two speakers who will tailor their presentations for students, or sections that cover a large geographical area might request funding to subsidize the cost of housing students for a night. Sections that do not traditionally include student presentations are encouraged to apply for grants to help include undergraduate students in their mathematical activities.

Independent conferences can be structured in a variety of ways. We will briefly describe two examples of successful regional undergraduate mathematics conferences that could serve as models for others throughout the country. Both the Hudson River Undergraduate Mathematics Conference (HRUMC) and the Youngstown State University Pi Mu Epsilon Regional Conference (YSUPMERC) focus on presentations by undergraduate students. However, these two conferences have significant differences in their structures and financial requirements. These differences illustrate the variety of possible formats for regional undergraduate mathematics conferences. Many other possibilities are appropriate, limited only by the imagination of the proposer.

The HRUMC has been held every April since 1994 and rotates among schools in the Northeast. It is a one-day conference held on a Saturday whose theme is to "welcome undergraduates to the mathematical community." At the HRUMC there is a nationally known featured speaker. For example, John Conway, Ron Graham, Jean Taylor, and Benoit Mandelbrot have spoken at past conferences. The majority of the conference is devoted to sessions for contributed presentations by both undergraduates and faculty members. The presentations are organized into sessions with a common mathematical theme, and student presentations are integrated with faculty presentations. This is consistent with their goal of integrating

undergraduates into the mathematical community. The conference also includes a lunch and an opportunity for the students to visit with the featured speaker. It has grown from approximately 270 participants in 1994 to over 400 participants in 2002. There have been over one hundred presentations at each of the last five conferences with approximately seventy-five percent of these coming from undergraduates. The number of participating colleges and universities has grown from forty-four in 1994 to over eighty-seven. The HRUMC has an annual budget of approximately \$8,000 and has received financial support from the Alfred P. Sloan Foundation, the National Science Foundation, the G. E. Fund, the New England Consortium for Undergraduate Science Education, the Pew Science Program in Undergraduate Education and a Hughes Medical Grant to Williams College. There is no registration fee for the conference, but students are responsible for their own transportation, which typically is provided by their departments.

The YSUPMERC is also a one-day conference held on a Saturday which began in 1997. It is held at Youngstown State University, and all schools located within a two-hour drive of Youngstown are invited to attend. It begins at 10:00 AM and ends by 4:30 PM so that participants from the region can easily come for the day, and is devoted entirely to undergraduate presentations. In 2002, more than 100 undergraduates from ten colleges and universities attended the conferences, as well as high school students, their teachers, graduate students, and faculty members. There were approximately thirty presentations by undergraduates, and there were also group sessions where students can talk about their experiences on the COMAP Mathematical Modeling Contest, REU's, internships, the Putnam Competition, or other items of student interest. The YSUPMERC has a budget of only about \$500 per year. Costs have also been

reduced by having a totally electronic advertising base, and financial support is provided by Pi Mu Epsilon, Youngstown State University, and local merchants. It does not have a registration fee.

Even though the HRUMC and the YSUPMERC are structurally different, they have the same mission. Both conferences focus squarely on undergraduate students; every presentation, whether given by a student, faculty member or an invited speaker is accessible to undergraduates, and all students are encouraged to attend, including underclassmen, students not making presentations, and students not yet committed to a career in mathematics. Students find a supportive environment to practice oral communication of mathematics. Both conferences have a diverse group of presentations, many of which include original research, so that students gain a better understanding of the breadth of mathematics and the dynamic nature of mathematics, and both conferences are held on a single day with no registration fee, so students are able to attend at minimal cost.

Structure of the Conferences

Faculty members interested in organizing an undergraduate mathematics conference can choose to model their conference after the HRUMC, the YSUPMERC, or develop a format more appropriate to their situation. Each region of the country is unique and what works in one region may not work in another. The mathematicians from each region are most likely to know what will work best for them, so organizers will be given considerable freedom to structure a conference that will be successful in their region.

Organizers can decide whether or not to include a featured speaker or faculty talks, provided all presentations are accessible to undergraduates. To increase the number of student presenters at future conferences, organizers may have sessions on how to choose an

undergraduate research topic or how to prepare a mathematics talk. A conference might include a presentation on summer opportunities for undergraduates or a panel discussion on graduate programs in mathematics or career options in mathematics. As long as every part of a conference is targeted at undergraduates and students are given an opportunity to make presentations, many formats are possible.

The RUMC Grant Committee encourages the MAA sections to hold an undergraduate conference in conjunction with, or in addition to, their regular section meetings. Section organizers might have special sessions for undergraduates before, during, or after the conference. Organizing an undergraduate conference in this way would allow for more efficient use of resources. In addition, students attending the special undergraduate sessions could also attend the traditional sessions. Although an undergraduate conference designed in this way would be eligible for funding, it can only be used for the special sessions for undergraduates, and the conferences must be inclusive. Funding cannot be used to support activities that are traditional at the conference, and conferences cannot limit student speakers to those presenting original research or students who attended summer research programs. All undergraduate students, including underclassmen and non-mathematics majors, must be welcome to attend, and students must be able to make a presentation in any area with sufficient mathematical content. To ensure quality of the presentations, however, organizers will be encouraged to have students submit abstracts for their presentations and to have a faculty member from the student's institution verify that the work is appropriate for presentation at the conference. This format is used for the MathFest presentations and, with only a few exceptions, has proven to be adequate to ensure quality student work.

Role of the Conference Program Director

In order to support your conference, we need some information from you before the conference, as well as documentation of expenses afterwards. We also expect that Conference Program Directors will facilitate the evaluation process for participants, and complete a report about the conference. These expectations are described below in more detail and relevant forms are included in this handbook. The authority and responsibility for designing and conducting an RUMC conference rests with the Conference Program Director. The RUMC Grant Committee and MAA staff will facilitate/support the activities of the Conference Program Director. The responsibilities for each of these groups are outlined in the following sections.

- *Acknowledgement of the contribution of the MAA and the NSF:* Conference Program Directors must acknowledge in any advertising, on all program handouts, and on the local program website that the program is an MAA RUMC sponsored activity funded by NSF grant DMS-0846477.
- *Advertising for the Program:* If you choose, the MAA will post an announcement for your conference on the MAA website. We can also send an announcement of your conference to MAA Liaisons in your region. To take advantage of these options, you will need to supply the URL for the conference's website so it can be linked to from the summary on the MAA RUMC site. In exchange, please also provide a link from your site to the MAA RUMC site. Your website, as well as any other advertising material you generate, must acknowledge that the program is an MAA RUMC sponsored activity, funded by NSF Grant DMS-0846477.

- *Communication with participants:* The Conference Program Director is responsible for providing logistical and programmatic information on the conference to students at all schools in the area prior to the registration deadline. This is typically handled through email.
- *Local arrangements:* The Conference Program Director is responsible for making all local arrangements for the conference. To assist with the logistical arrangements, we have prepared a planning guide, which can be found in the appendix. The Conference Program Director should attend to all logistical needs of the conference including, amongst other things, recruiting members of the campus and local community to be involved with the conference; identifying local resources that will contribute to the success of the conference; reserving appropriate meeting space; making arrangements for food, lodging, and local transportation; and ensuring that all costs are within the approved budget. We recommend that you recruit some of your students to help during the conference to perform miscellaneous tasks as needed.
- *Evaluation activities:* The Conference Program Director will prepare and administer a written evaluation questionnaire, to be completed by each conference participant at the conclusion of the conference. The sample questionnaire, included in the appendices to this document, may be used, if desired. However, any other format is also acceptable, as long as it covers the same areas as the sample questionnaire. All responses should be summarized for the MAA electronic On-Site Report and submitted to the MAA within forty five days of the completion of the conference.

- *Reports:* Complete the electronic On-site Report Form at <http://forms.maa.org/r/rumc/add.aspx> following the conclusion of the conference. We ask that all reimbursement requests and report forms be completed and submitted to the MAA **within forty five days of the conclusion of the conference.**

Role of the MAA

The MAA staff is responsible for the overall management of the NSF-RUMC grant. The MAA will advertise the programs, oversee the budgets, coordinate the program evaluation activities, and provide technical support and advice as needed. The MAA will also maintain records, write reports, manage grant finances, and communicate with committees, Conference Program Directors, potential Conference Program Directors and participants. Specifically, the MAA will manage:

- *Advertising for the Programs:* The MAA will announce conferences on the MAA RUMC website and in other publications, as appropriate.
- *Financial Relationships:* Each Conference Program Director, or their institution, as circumstances require, will receive a formal agreement from the MAA, in the form of a Memorandum of Understanding (MoU). This will outline acceptable methods of payment and reimbursement for conferences expenses, and should be signed and returned to the MAA in order to formalize the conference's support.
- *Overall Program Management:* The MAA staff will communicate with the Conference Program Directors and the RUMC Grant Committee regarding the overall RUMC program, and will be available to the Conference Program Directors for issues that arise in coordinating the

conferences. The MAA will maintain records for each conference with conference proposals, Memoranda of Understanding, correspondence with Conference Program Directors, and all financial information. The MAA will also create and submit reports of the conferences and the RUMC program to appropriate MAA committees and the granting agency.

Role of the RUMC Grant Committee

The RUMC Grant Committee will solicit proposals, select the proposals to be funded and assign the amount of funding, and visit selected conferences in an effort to ensure that the RUMC grant program is proceeding in a manner consistent with the vision of the Committee, the MAA, and the granting agency. The RUMC Grant Committee also works with MAA to establish proposal guidelines and evaluation criteria and to develop materials necessary for the operation of the various events. Any questions for the RUMC Grant Committee should be addressed to the RUMC Program director, Michael Dorff, at mdorff@math.byu.edu.

Grant Financial Management Information

The Regional Undergraduate Mathematics Conferences program is funded by a grant from the National Science Foundation. Consequently, the MAA is responsible for adhering to all applicable provisions of the administrative and cost principles in 2 CFR 215, 2 CFR 230, and NSF GC-1 which govern the use of these federal funds. For the funds it grants, each MoU delegates this responsibility to the signatory, whether this is the Conference Program Director, the host institution, or some other entity. The following information is provided as a brief overview of the responsibilities of the MAA in administering this grant so that Conference Program Directors may better understand the requests made of them. It is not intended to serve as a substitute for the

aforementioned principles, and Conference Program Directors should refer to those directly, should they require authoritative information on these issues.

The following is a summary of some of the conditions on the use of federal funds which may be relevant to Conference Program Directors.

- *Cost-Sharing and Cost-Sharing Records:* If applicable, the awardee must cost-share under the award in accordance with any specific requirements contained in or referenced by the applicable program announcement, solicitation, or award letter. The awardee must maintain records of all project costs that are claimed as cost-sharing as well as records to be paid by the Government. Such records are subject to audit.
- *Unallowed Costs:* The Federal Government provides 56 principles to be applied in establishing the allowability of certain items of cost. These principles apply whether a cost is treated as direct or indirect. Failure to mention a particular item of cost is not intended to imply that it is unallowable; rather, determination as to allowability in each case should be based on the treatment or principles provided for similar or related items of cost.

Items of interest to the MAA include:

- Participant support costs are direct costs for items such as stipends or subsistence allowances, travel allowances, and registration fees paid to or on behalf of participants or trainees (but not employees) in connection with meetings, conferences, symposia, or training projects.
- The costs of materials and supplies necessary to carry out an award are allowable. Such costs should be charged at their actual prices after deducting all cash discounts, trade discounts, rebates, and allowances received by the organization.

- Capital expenditures for general-purpose equipment are unallowable as a direct cost except with the prior approval of the awarding agency.
- Costs of alcoholic beverages are unallowable.

Conference Funding and Reimbursement of Expenses

MAA disburses all grant funds on a reimbursement, direct billing, or direct payment basis. This means that an expense has to have been incurred before grant funds can be requested. All expenses that fall within the approved budget will be paid directly by the MAA upon receipt of proper documentation. The MAA will only reimburse expenses up to the amount of the approved budget. Report any unreimbursed expenses as cost sharing; these should be documented in the same manner as expenses for payment or reimbursement. We strongly encourage you to set up an account at your home institution; in this case, **we can reimburse the institution directly upon receipt of an invoice itemizing the expenses.** If you require that some of the expenses to be reimbursed directly to Conference Program Directors or other individuals, please refer to the attached MAA Grant Expense Reporting Form and description of the procedure in the attachment.

Contact Information

For general inquiries about the MAA RUMC program, please contact:

Michael Dorff mdorff@math.byu.edu
RUMC Program Director

Olga Dixon odixon@maa.org
Sponsored Programs Manager 202-319-8498

Appendices

Mathematical Association of America Regional Undergraduate Mathematical Conferences

Conference Planning Guide

The following questions are intended as points for conference organizers to consider during the planning stages. Many of them may seem obvious, but are included to remind organizers that participants may need to be made aware of this information.

Program Information

What is the name of the conference?

Who are the Conference Director and other leaders, how to contact them during the event?

What are the dates and the schedule of the conference?

When are the participants expected to arrive and depart?

Travel Information

Are directions to the conference site clear and easily available to participants?

Where is parking available to participants? How much does it cost?

Is there any other travel information that may be helpful to participants?

Accommodation

Will participants be housed in a university dormitory or a hotel for two-day conferences?

What is the cut-off date for reservations?

Are there arrangements for participants with disabilities or other special needs?

Will the room be private or shared? If shared, how will roommates be assigned?

May participants request a smoking or a non-smoking room?

Is there internet access?

How far is the meeting space from the housing? What transportation is available?

Meals

How can a participant arrange for special dietary needs?

Which meals will be provided? When will these meals be provided?

Will meals be served at the campus dining facility or another location?

Will participants be issued meal cards or meal tickets?

During the meeting itself, will there be beverages and snacks available?

Meeting Space

Will the program take place in a university classroom or conference center?

When will breaks be held?

Are computer services, including internet or email access, available?

What audiovisual equipment will be available for the conference?

Will the presenters have access to copy machines, transparencies, and other office supplies?

Mathematical Association of America
National Science Foundation
Regional Undergraduate Mathematical Conferences

Conference Timeline and Checklist

Done	Task
	6-12 months before conference
	Write proposal, draft agenda, and calculate budget
	Submit proposal and budget for possible grant award
	Make initial contacts and arrangements
	4-6 months before conference
	Receive notification from MAA regarding possible grant award
	Prepare promotional materials per guidelines
	Confirm dates and location of conference
	Sign and return MOU to MAA confirming commitment to run conference
	Make final arrangements for meeting space
	Invite guest speakers and presenters
	Appoint a local coordinator, if necessary
	Do preliminary advertising.
	Construct a web site for the conference
	3-4 months before conference
	Prepare maps, driving instructions, information sheets on institution, region, etc
	Prepare contracts, etc as needed for conference
	Arrange catering, making sure to take account of special dietary needs
	Send invitation letters to potential participants
	Update conference agenda
	Update the conference web site
	6-8 weeks before conference
	Arrange shuttle transportation between conference locations, if needed
	Publicize the conference
	Make pre-conference assignments for volunteers
	Order any materials that may be necessary
	Reserve audiovisual equipment
	Send email/letter to participants with logistical information and conference details
	Confirm presentations by guest speakers
	Update conference agenda
	Finalize or update conference website
	2-4 weeks before conference
	Finalize hotel lists and catering counts

	Send reminder email to participants with final logistical details
	Send information to speakers regarding availability of audiovisual equipment
	Coordinate activities of the local coordinator and student assistants, including making signs, nametags, packets for participants with handouts, taking pictures during conference, computer support, taking notes, audiovisual equipment set-up, etc
	Update conference website
	1-2 weeks before conference
	Confirm hotel, transportation, meeting space, audiovisual, and catering orders
	Gather office supplies that may be needed during conference
	Confirm on-site support with student assistants and/or local coordinator
	Finalize details with guest speakers, obtain handouts for copying, etc
	Set final agenda with co-coordinators
	Update conference website
	Arrange for local media coverage of the conference
	Immediately before conference (1-2 days)
	Final preparations for participant packets (copying)
	Send final head counts to catering, hotel, etc
	Update conference website
	Confirm details of local media coverage of the conference
	During conference
	Arrange for coverage at registration table
	Make sure copy machine is available
	Make sure guest speakers are accommodated
	Troubleshoot issues as they arise (catering, sleeping rooms, transportation, AV)
	Distribute/collect conference evaluations
	Ensure that local media are accommodated
	After conference (within 30 days)
	Review completed evaluation forms and summarize the data for On-Site Report to the MAA
	Send thank you notes to speakers, helpers, local media, and any others, if needed
	Submit electronic On-Site Report to the MAA at http://forms.maa.org/r/rumc/add.aspx
	Submit invoices or expense reimbursement forms as necessary to the MAA
	Follow-up with participants as needed (for publications, other presentations, etc)

Mathematical Association of America
Regional Undergraduate Mathematics Conferences

Conference Evaluation Form for Participants

Thank you for participating in our conference. Please take a few minutes to complete this form. Your feedback will help us improve future conferences. Thank you for your input.

Demographic Information

Please note that this information is both optional and anonymous. Aggregate data are collated and reported to the NSF.

Gender:

- Female Male

Race & Ethnicity:

Check all that apply.

- African American American Indian
 Asian Hispanic/Latino
 Pacific Islander White
 Other (please indicate):

Class Standing:

- Freshman Sophomore
 Junior Senior
 Graduate Student Not Studying

Major(s):

- Mathematics Other (please indicate):

Minor(s):

- Mathematics Other (please indicate):

Total Enrollment at Your Institution:

- < 2,000 2,000-4,999
 5,000-15,000 > 15,000

Conference Information

Highest Math Degree at Your Institution:

- Associate Bachelor
 Master Doctorate
 Other (please indicate):

Do you plan to continue your study of mathematics (or a related discipline) at the graduate level?

- Yes No

Of which mathematical societies are you a member, if any?

- MAA AMS
 KME PME
 University/College Math Club
 Other (please indicate):

Did you present a paper at this conference?

- Yes No

Have you previously attended an undergraduate mathematic conference?

- Yes No

If so, have you presented a paper at a previous conference?

- Yes No

Please be as detailed as possible.

Did the conference seem well-organized?

Yes

No

Would you attend another conference like this one?

Yes

No

Did you have enough opportunity to meet students from other institutions?

Yes

No

What went well with this conference?

What could have been improved?

Are there any sessions that you felt should have been included, but weren't?

Please share any further comments or feedback you might have in the space provided below.

Reimbursement of RUMC Expenses to Individuals

The Conference Program Director and the MAA Facilitator are required to authorize all expenses by signing the appropriate forms before payment or reimbursement can be made. The appropriate forms consist of the MAA Grant Expense Reporting Form (which always needs to be submitted) and the MAA Grant Personnel Activity Form with Time and Attendance (submitted in addition to the Grant Expense Reporting Form only when requesting any type of stipend).

- *Reimbursement for Expenses:* All requests for reimbursement or payment of expenses are to be submitted on a MAA Grant Expense Reporting Form. This form has prelisted some of the most often used budget expense items and account codes. If a budget expense item is not listed on the form, the budget expense and item name should be written in at the bottom.

The Form should be filled out completely, signed by the requestor and the Conference Program Director, and then sent to the MAA Programs and Services Department. Proper documentation (original receipts, invoices, etc.) is needed for all expenses of \$25 or more and must accompany the MAA Grant Expense Reporting Form. Original receipts/invoices are mandatory when the reimbursement request is for the total amount of an expense. Copies are only acceptable when the MAA is reimbursing or paying only a portion of an expense.

For travel, actual expenses will be reimbursed, but a per diem may be used if budgeted and approved as such by the funding agency. Notwithstanding the aforementioned rules, flights should always be on a US flag carrier at coach rate and the ticket receipt, showing cost, flight class, and airline carrier, must accompany all requests for reimbursements of air flights. The current government mileage reimbursement is 56.5 cents per mile

Please note that it is important to have all documentation intact so that reimbursements are not delayed.

- *Reimbursement for Personnel Expenses:* The Grant Personnel Activity form should be filled out as the work reported takes place, signed by the requestor and the Conference Program Director, and then sent to the MAA Programs and Services Department to authorize payment to any personnel. This applies to all personnel payments, whether they are salary, stipend, subcontract, honorarium, or any other sort. For the purposes of the RUMC program, the only expected expense in this category might be an honorarium for an invited speaker.

The documentation needed for verification of each honorarium, stipend or salary paid by a grant must be attached to the Grant Personnel Activity Form and submitted in addition to the MAA Grant Expense Reporting Form. The Conference Program Director is responsible for verifying that each person attended the meeting and performed the required service.

Government auditors expect to have contracts or letters of agreement for every honorarium or stipend that is paid, regardless of the length of time taken to perform the service. When payment is requested, all available letters of invitation or announcements of meetings should be attached to demonstrate that the honorarium/stipend to each person was agreed upon as part of attending a meeting or other function, and that it is part of the grant budget. Personnel expenses have to be reasonable and comparable to service rates on non government contracts and grants.

MAA GRANT EXPENSE REPORTING FORM

PAYABLE

TO: _____ DATE: _____
 Address: _____ GRANT NAME: RUMC
 _____ GRANT NUMBER: 3-8-711-905

SIGNATURE _____ SSN# _____
 (for stipend requests only)

AUTHORIZATION SIGNATURE _____

*NOTE: A TIME AND ATTENDANCE FORM IS REQUIRED WHEN RECEIVING PAYMENT FOR PERSONNEL EXPENSES.

*PERSONNEL EXPENSES		Account	Task #
Professional Salaries: Dates of Service: _____ Total hours/ days worked: _____	\$	5110	_____
Support Salaries: Dates of Service: _____ Total hours/ days worked: _____	\$	5130	_____
Fringe Benefits: Types of Benefits: _____	\$	5320	_____
HONORARIA & STIPENDS Stipends – Date: _____	\$	6030	_____
TRAVEL EXPENSES Dates of Travel: _____ Purpose of Travel: _____ Transportation: _____ Hotel: _____ Subsistence: _____	\$ \$ \$	7160	_____
PARTICIPANTS' SUPPORT COSTS Stipends – Dates of Participation: _____	\$	6000	_____
Travel for Participants: Dates of Travel: _____ Purpose of Travel: _____ Transportation: _____ Hotel: _____ Subsistence: _____ Other: _____	\$ \$ \$ \$	7760 7760 7770 7780	_____ _____ _____ _____
CONSULTING SERVICES Dates of Service: _____ Total Hours Worked: _____	(per budget) \$	6000	_____
OFFICE EXPENSES Telephone: _____ Postage: _____ Printing & Duplicating: _____ Supplies: _____	\$ \$ \$ \$	6110 6120 6130 6510	_____ _____ _____ _____
OTHER EXPENSES _____ _____ _____	\$ \$ \$	_____ _____ _____	_____ _____ _____

ALL RECEIPTS MUST BE ATTACHED FOR ALL EXPENSES.

TOTAL EXPENSES \$ _____

Please return this form with all attachments to:
MAA, Programs and Services, 1529 18th Street NW, Washington, DC 20036

THE MATHEMATICAL ASSOCIATION OF AMERICA
Policy Governing Reimbursement of Travel Expenses

GENERAL

1. Reimbursement by MAA for travel expenses is intended as repayment for actual out-of-pocket expenses only.
2. Signatures: the traveler must sign this request; an approval signature and date is necessary for all grants.
3. No claim should be made to MAA for expenses for which reimbursement is received from other sources. In the case of a trip for which reimbursement is received from more than one source, expenses should be allocated in a reasonably proportional manner.
4. Original receipts are to be supplied for travel, lodging, and for any other single item for expenditure \$25.00 or more. For mileage reimbursements please attach a distance confirmation (i.e. Google Maps printout).
5. Persons requesting reimbursement are expected to observe prudent economy in choice of lodging, meals, and mode of travel. The following statements are intended to clarify and make more explicit this general policy.

TRAVEL

1. It is expected that anyone whose travel expenses are to be reimbursed by MAA will travel by the more direct route in terms of time and distance. Major deviations should be explained.
2. Airplane travel should be on a US flag carrier at coach (tourist, economy, and single class) rate. Travelers are urged to seek special discount rates wherever possible.
3. Short daytime trips by train should be by coach. For overnight trips, a roomette should be used.
4. Rental cars should be used only where the cost is less than that of public transportation or where public transportation is not available and the rental cost is less than that of the taxi. Travelers are urged to seek weekend or other discount rental rates.
5. Travel by private cars should be for relatively short trips only. Reimbursement is at the rate of 56.5 cents per mile and this is intended for automotive expenses excluding toll charges and parking fees.
6. Except in cases where special circumstances preclude travel by public carrier, reimbursement for trip over 600 miles round trip by private car will be at the rate of minimum air fares available during reasonable travel hours at the time of the trip, plus an allowance for taxi or limousine to and from the airport.

LODGING EXPENSES

1. Reimbursement will be made for actual expenses for lodging and meals.
2. Reimbursement is authorized for hotel and meals at moderate local rates. As a general rule, these rates should be within federal per diem limit (current federal per diem rates are available at <http://www.gsa.gov/portal/category/21287>). Travelers are expected to seek the lowest rates available within reasonable limits of comfort and convenience. Personal charges such as phone, in-room movies, laundry should not be included.

MISCELLANEOUS EXPENSES

1. Reimbursement is authorized for necessary taxi and limousine expenses in connection with air or train travel. A modest amount of miscellaneous expenses such as tips to porters and business telephone calls is permitted. Tips to waiters should be included as part of the meal costs. Reimbursements will include expenses for materials needed in a presentation for a meeting such as copying and supplies. Unusual expenses should be explained. Receipts are needed for any expenditure \$25.00 or more.