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Your Budget – Overview

Key Grant Information

- TEFD will transfer your Mutual Mentoring Grant to your departmental GOF. Once received, your bookkeeper or business manager may be able to transfer your grant to your research trust fund (RTF). TEFD cannot transfer directly to RTFs.

- Your Mutual Mentoring Grant will expire on August 30, 2016 (Team Grants) and July 31, 2016 (Micro Grants). Extensions may be possible with proper advance communication with your TEFD grant liaison.

Good Practice Involving Mutual Mentoring Grants

- Review the UMass Travel Manual, if traveling

- Review the minimum hourly rates for graduate students assistants, if hiring

- If you are planning to pay an honorarium or a fee, and/or reimburse an individual who is not a UMass employee (e.g., an external mentor or developmental editor), consult with your bookkeeper about any required paperwork that needs to be filled out in advance.

- Keep a spreadsheet to track what you think you’ve spent so you can compare it against actual charges.

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Activity</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/6/2015</td>
<td>Judies - Amherst</td>
<td>Planning session</td>
<td>$96.48</td>
</tr>
<tr>
<td>9/28/2015</td>
<td>CC 165</td>
<td>Kickoff meeting</td>
<td>$97.12</td>
</tr>
<tr>
<td>10/20/2015</td>
<td>CC 165</td>
<td>Team Meeting</td>
<td>$84.18</td>
</tr>
<tr>
<td>11/17/2015</td>
<td>CC 168</td>
<td>Team Meeting</td>
<td>$79.16</td>
</tr>
<tr>
<td>1/25/2015</td>
<td>House of Teriyaki</td>
<td>Team Meeting</td>
<td>$226.40</td>
</tr>
<tr>
<td>3/26/2016</td>
<td>Amherst Chinese</td>
<td>Team Meeting</td>
<td>$114.49</td>
</tr>
<tr>
<td>4/10/2016</td>
<td>Big Y (snacks)</td>
<td>Team Meeting</td>
<td>$73.26</td>
</tr>
<tr>
<td>5/25/2016</td>
<td>CC 165</td>
<td>Team Meeting</td>
<td>$153.40</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total Spent</td>
<td>$1,022.69</td>
</tr>
</tbody>
</table>

| Budget remaining | $177.31 |

Date Location Activity Cost
9/6/2015 Judies - Amherst Planning session $96.48
9/28/2015 CC 165 Kickoff meeting $97.12
10/20/2015 CC 165 Team Meeting $84.18
11/17/2015 CC 168 Team Meeting $79.16
1/25/2015 House of Teriyaki Team Meeting $226.40
3/26/2016 Amherst Chinese Team Meeting $114.49
4/10/2016 Big Y (snacks) Team Meeting $73.26
5/25/2016 CC 165 Team Meeting $153.40

Total Spent $1,022.69

Budget remaining $177.31
Planning an Event – Overview

1) Select a date and time for your event

2) Before confirming your event date, here are some calendars you may want to check to avoid conflicts with holidays, religious observances, and school closings.
   a. UMass Academic Calendar
   b. UMass Event Calendar
   c. Five Colleges Academic Calendars
   d. Religious Observance Calendars
   e. Amherst-Pelham School Calendar
   f. Northampton School Calendar

3) Find a room/location for your event

4) Publicize your event

5) Cater your event

6) Host your special guest
Find a Room/Location for Your Event

Rooms in Your Building

• Check with your departmental administrator

Campus Center Event Rooms

Phone: 577-8200
Email: ccevents@mail.aux.umass.edu
Book Online: http://www.umassauxiliaryservices.com/events/events-room-request/
• List of Room Capacities

Mullins Center Rooms

Phone: 545-1867
Email: James Staple, jstaple@admin.umass.edu
Book Online: http://www.mullinscenter.com/arena-info/book-a-function-room
• List of Room Capacities and Rental Fees (scroll down)
• Calendar of events (check before requesting a room – due to sports events, Mullins may not be available)

University Club (a.k.a. Faculty Club)

Phone: 545-2551
Website: http://www.umassuclub.com/
• Scroll down to “Facilities” to see room capacities
W.E.B. Du Bois Library
The UMass Amherst Libraries welcome applications to hold events in their facilities that enhance the academic or cultural life of the campus community, and/or contribute to the professional development of the faculty or staff of UMass Amherst. Three weeks’ notice minimum is required and space requests are considered on a first-come, first-served basis.

Event Policy:
http://www.library.umass.edu/about-the-libraries/policies/libraries-event-policy/

Request Online:
http://www.library.umass.edu/services/event-and-publicity-application/

Off-Site Locations
If you want to host an event, such as a team dinner with an external mentor, at a local restaurant, talk with your bookkeeper about using your travel card or getting a purchase order for the restaurant.
Publicize Your Event

Useful to Include:

- Name of event or speaker
- Title of event or talk
- Date
- Start and end time
- Location
- Contact person
- Proper attribution - “Supported by a Mutual Mentoring Team Grant from the UMass Amherst Institute for Teaching Excellence & Faculty Development.”

Publicize to departmental calendar, if available.

Publicize on the UMass campus-wide calendar, if desired. (Scroll to the right side of the screen to “Submit an Event.”)

Publicize on the Five College events calendar, if desired, following the instructions exactly as written on the website.
Cater Your Event

Catering (UMass Catering)

Phone: 577-8235
Email: catering@mail.aux.umass.edu

UMass Catering must be used for all events in the Campus Center, Mullins Center, and Library.

Advance notice required for:
- Dinners and receptions: 10 business days
- Simple breakfasts and lunches: 5 business days
- Late fees will be charged for orders placed less than 4 days before an event

Here’s what catering will need to know about your event:

Your Name:
Your Email Address:
Your Phone Number:
Name of Event:
Date of Event:
Start & End Time of Event:
Estimated Headcount:
Order: E.g.,
Speedtype Number:
Special Notes: E.g., Please set up by 1:30 PM. Please use maroon tablecloths. Please use paperware (or china), etc.

Catering (from Off-Campus)
Check with your departmental administrator if you are holding an event in your building and would like to use an off-campus caterer, such as the Black Sheep.
Host Your External Mentor

Campus Center Hotel

Phone: 877-822-2110 or 413-549-6000
Website: http://www.umasshotel.com/

The Campus Center Hotel accepts your Speedtype Number to make reservations and as a form of payment. CALL the hotel with your guest’s name, address, telephone number, dates of visit, and your Speedtype Number. You cannot make online reservations with a Speedtype.

Paying or Reimbursing Your Special Guest
Your guest must become a “vendor” of the UMass system before s/he can be issued a check for an honorarium or reimbursement of travel expenses. It is in your best interests to make sure your guest submits the following paperwork to your bookkeeper well in advance of his/her visit.

- **This W-9 form** is required for all *domestic visitors* expecting reimbursement or honoraria.

- **This W-8 form** is required for all *foreign visitors* expecting reimbursement or honoraria.

Your guest must submit ORIGINAL RECEIPTS to your bookkeeper in order to be reimbursed.

Picking up/Dropping off at Airports, Train Stations, etc.
UMass Transit Services offers Meet & Greet services for your guests at Hartford Bradley Airport, the Springfield Amtrak Station, and other locations in the valley. They also offer an inside terminal pick-up service for a nominal fee.
Contact Information

Institute for Teaching & Faculty Development

301 Goodell Building
General Number 413-545-1225
Fax 413-545-3829
http://www.umass.edu/ctfd/mentoring/index.shtml

Jung Yun, Director of New Faculty Initiatives, jungy@umass.edu

Brian Baldi, Assistant Director of TEFD, bbaldi@umass.edu

Who to Contact If...

<table>
<thead>
<tr>
<th>Question</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have general questions about your grant</td>
<td>Your grant liaison</td>
</tr>
<tr>
<td>You would like to change one or more of the activities described in your proposal</td>
<td>Your grant liaison</td>
</tr>
<tr>
<td>You would like to update your activity log</td>
<td>Your grant liaison</td>
</tr>
<tr>
<td>You need to make significant changes to your grant budget</td>
<td>Your grant liaison</td>
</tr>
<tr>
<td>You have financial questions about your grant funds</td>
<td>Your bookkeeper</td>
</tr>
</tbody>
</table>