



**Regional Undergraduate Mathematics Conferences**  
**Conference Program Director's Handbook**



**NSF Grant DMS-0846477**

*Updated June 2010*

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 National Science Foundation Regional Undergraduate Mathematical Conferences (NSF-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 NSF-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 NSF-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, complete a report about the conference, and file a follow-up report. 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 NSF-RUMC conference rests with the Conference Program Director. The NSF-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 NSF-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 and MAA Student Chapter Advisors 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 NSF-RUMC site. In exchange, please also provide a link from your site to the MAA NSF-RUMC site. 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.

- *Provide Programmatic Information to the MAA:* In order to facilitate your conference, there are a number of documents and other details we will need to know or be updated regarding, as they develop, including:
  - A brief description of the conference that can be used in advertising;
  - The dates of the conference, including registration deadlines, if they are necessary;
  - An updated, detailed agenda; and,
  - A list of other professional societies or organizations to which it may be appropriate to advertise the conference.
  
- *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 any 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 thirty 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 in MAA publications and on the MAA NSF-RUMC website. The MAA will also announce programs in publications of other professional societies, 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 NSF-RUMC Grant Committee regarding the overall NSF-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 workshop with conference descriptions, Memoranda of Understanding, correspondence with participants including logistical arrangements and details, and all financial information. The MAA will also create and submit reports of the conferences and the NSF-RUMC program to appropriate MAA committees and the granting agency.

## **Role of the NSF-RUMC Grant Committee**

The NSF-URC 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 NSF-RUMC grant program is proceeding in a manner consistent with the vision of the Committee, the MAA, and the granting agency. The NSF-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 NSF-RUMC Grant Committee should be addressed to the Chair of the Committee, Doug Faires, at [NSF-URC@math.ysu.edu](mailto:NSF-URC@math.ysu.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 OMB A-110, OMB A-122, 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.

- *Foreign Air Travel:* Any air transport to, from, between, or within a country other than the United States of persons or property, the expense of which will be assisted by NSF funding, must be performed by or under a code-sharing arrangement with a US flag air carrier if service by a US flag carrier is unavailable. For all short-distance travel, regardless of origin or destination, use of a foreign-flag air carrier is permissible if the elapsed travel time on a scheduled flight is three hours or less and service by a US flag air carrier would be double the travel time.
- *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:

- Capital expenditures for general-purpose equipment are unallowable as a direct cost except with the prior approval of the awarding agency.
- 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.
- 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.
- 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 NSF-RUMC program, please contact:

|                                   |  |
|-----------------------------------|--|
| Michael Pearson                   | <a href="mailto:pearson@maa.org">pearson@maa.org</a> |
| Director of Programs and Services | 202-387-5200   |
| Olga Dixon                        | <a href="mailto:odixon@maa.org">odixon@maa.org</a>   |
| Sponsored Programs Assistant      | 202-319-8498   |

## **Appendices**

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### **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 Program Director and other leaders?
- What are the dates of the conference?
- What is the schedule of the conference?
- When are the participants expected to arrive and depart?

#### **Travel Information**

- What is the closest airport to the conference site?
- Which airlines fly to this airport?
- What alternative forms of transportation are available?
- How far is the airport from the conference site?
- How will participants get from the airport to the site?
- Is there any other travel information that may be helpful to participants?

#### **Accommodation**

- Will participants be housed in a university dormitory or a hotel?
- What is the cut-off date for reservations?
- Are there arrangements for participants with disabilities or other special needs?
- When will the rooms be available?
- What will participants need to do to check in to their rooms?
- What is the procedure for before- or after-hours check-in?
- Will the room be private or shared?
- If shared, how will roommates be assigned?
- May participants request a smoking or a non-smoking room?
- Will linens be provided (sheets, pillows, blankets, towels)?
- Are there private bathrooms and showers?
- Are the rooms air conditioned?
- Is there internet access?

What telephone services are available?

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

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?

If the group will go out to dinner, has transportation been arranged?

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 this be available to the student presenters and guest speakers?

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

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## Conference Timeline and Checklist

| Done | Task   |
|------|--|
|      | <b>6-12 months before conference</b>   |
|      | Write proposal, draft agenda, and calculate budget                                   |
|      | Submit proposal and budget for possible grant award                                  |
|      | Make initial contacts and arrangements   |
|      |  |
|      | <b>4-6 months before conference</b>  |
|      | 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  |
|      |  |
|      | <b>3-4 months before conference</b>  |
|      | 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   |
|      |  |
|      | <b>6-8 weeks before conference</b>   |
|      | 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  |
|      |  |
|      | <b>2-4 weeks before conference</b>   |
|      | 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   |
|  |   |
|  | <b>1-2 weeks before conference</b>  |
|  | 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  |
|  |   |
|  | <b>Immediately before conference (1-2 days)</b>   |
|  | 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   |
|  |   |
|  | <b>During conference</b>  |
|  | 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  |
|  |   |
|  | <b>After conference (within 30 days)</b>  |
|  | 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 <a href="http://forms.maa.org/r/rumc/add.aspx">http://forms.maa.org/r/rumc/add.aspx</a>  |
|  | Submit invoices or expense reimbursement forms as necessary to the MAA  |
|  | Follow-up with participants as needed (for publications, other presentations, etc)  |

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## 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

#### 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

## Conference Information

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 55 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 NSF-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: \_\_\_\_\_  
 \_\_\_\_\_ GRANT NAME: RUMC  
 \_\_\_\_\_ GRANT NUMBER: 3-8-711-905

SIGNATURE \_\_\_\_\_ SSN# \_\_\_\_\_

AUTHORIZATION SIGNATURE \_\_\_\_\_

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

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

ALL RECEIPTS MUST BE ATTACHED FOR ALL EXPENSES.

TOTAL EXPENSES \$ \_\_\_\_\_

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

**THE MATHEMATICAL ASSOCIATION OF AMERICA**  
**Policy Governing Reimbursement of Travel Expenses**

**GENERAL**

- Reimbursement by MAA for travel expenses is intended as repayment for actual out-of-pocket expenses only.
- Signatures: the traveler must sign this request; an approval signature and date is necessary for all grants.
- 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.
- Original receipts are to be supplied for travel, lodging, and for any other single item for expenditure \$25.00 or more.
- 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 \$. 50 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 \$1,000 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. 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.

**TRAVEL INSURANCE**

1. Travelers whose expenses are paid from MAA funds are covered by a group travel insurance policy.

