MSTE Policies and Procedures

March 2008
(updated March 2017)
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1.0 THE MISSION OF MSTE

1.1 RBC National Teaching Fund in MSTE

Purpose of the Fund
RBC National Teaching Fund in Mathematics, Science & Technology Education was established to support the Mathematics, Science and Technology Education Group in the Faculty of Education in ongoing efforts to enhance the teaching and learning of mathematics, science, technology and computer science in Canada.

1.2 MSTE Group Mission Statement

The Mathematics, Science and Technology Education Group is a research and development team at the Faculty of Education, Queen’s University, that is dedicated to improving teaching and learning in the mathematics, science and technology fields in schools and in teacher education.

In the pursuit of the mandate stated in the RBC Terms of Reference, and interpreted by the MSTE Mission, the Group’s activities are intended to promote:
(a) greater awareness of the links that can be made between mathematics, science, and technology education;
(b) the advancement of accessibility to these fields;
(c) education for social responsibility.

1.3 Terms of Reference for the RBC National Teaching Fund

Establishment of Fund
RBC National Teaching Fund in Mathematics, Science & Technology Education was established through a fulfilled pledge commitment of $1 million made to Queen’s University at Kingston by RBC in November 1989. Formal revised terms of reference for the Fund were finalized by Lily Harriss, Associate Director (Corporations and Foundations).

Purpose of Fund
RBC National Teaching Fund in Mathematics, Science & Technology Education was established to support the Mathematics, Science and Technology Education Group in the Faculty of Education in ongoing efforts to enhance the teaching and learning of mathematics, science, technology and computer science in Canada.
**Fund Guidelines**
Funds will be disbursed consistent with the following guidelines:

(i) **RBC Fellowship**
The Fellowships allow outstanding practitioners from the field of education to reside at the Faculty and contribute to the work of the MSTE Group. The Fellowships are awarded by the MSTE Executive Committee. The Fellowships provide for senior educators to spend an extended length of time at the Faculty. The MSTE sub-group sponsoring the Fellow is responsible for arranging the visit.

(ii) **RBC Lectureship**
The Lectureship, based on the Brockington model, is awarded by the MSTE Executive Committee. The Lecturer will give one major public lecture and be available to the University community as a whole. Suggestions for themes, lecturers and events are solicited from the University as a whole with the understanding that these will address the goals of the MSTE Group. The Executive Committee arranges the visit.

(iii) **RBC Visitorship**
The visitorship is available equally to each sub-group of MSTE and is awarded by the Executive Committee. Sub-groups may agree to pool resources to allow for more extended visits or visitors from greater distances, and for the integration of topics. The MSTE sub-group sponsoring the lecture is responsible for arranging the visit. [See the section on Visitors in this document.]

(iv) **Royal Bank MSTE curriculum resource, teacher support, school activities and capital expenditures**
Development, production and dissemination of curriculum and teaching and learning resources, teacher support activities, school activities, student events and capital expenditures outside of those covered by the operating budget.

**Fund Reporting and Stewardship**
It is the responsibility of the Secretary of the University to ensure that the terms of this agreement are met.

An annual endowed fund report will be prepared by the Office of Advancement.

**Fund Administration**
This Fund shall be administered by Queen’s University as a restricted capital endowment fund. Capital gifts contributed to this Fund shall be held in perpetuity. Donors may make additional contributions to the capital endowment fund at any time.

Where applicable, charitable gift receipts suitable for income tax purposes shall be issued to donors who make gift contributions to this Fund. All such contributions will be considered gifts of capital and will be added to the Fund’s
capital base, unless otherwise directed by the donor.

Contributions to this Fund shall be invested in the Queen’s Pooled Endowment Fund. This is a unitized fund which is valued monthly; the list of unit values can be found on the website http://www.queensu.ca/fins/policies/pooled_endowment_cost.html, or by directing your inquiry to your fund contact.

Upon establishment of the capital account, the fund shall earn investment income each year in a manner consistent with the spending policy established by the Board of Trustees of Queen’s University for the Pooled Endowment Fund. This policy provides that approximately 4.5% of the market value of the Pooled Endowment Fund is paid out each year. Returns in excess of this spending rate increase the unit value of the Pooled Endowment Fund. Each year the income account established for the purpose of funding the Fund is credited with the payout established by the University; the list of dividend rates can be found on the website http://www.queensu.ca/fins/policies/pooled_endowment_rates.html, or by directing your inquiry to your fund contact.

Amounts credited to the income account in any given fiscal year may be reinvested (all or part thereof) to increase the size of the capital base. Reinvestment will increase future investment earnings which in turn provide the opportunity to increase financial support.

General University Operating Fund
The General University Operating Fund (GUOF) is used to supplement other resources in financing the overall operations of the University. This amount will be calculated against the investment income earned by the capital endowment fund. The endowed gift to the capital account is not affected by this allocation and will remain intact.

The Board of Trustees will periodically review the suitability and success of the GUOF policy.

Queen’s University reserves the right to amend the GUOF guidelines consistent with policies as approved by the Board of Trustees.

Fund Disbursement
The Faculty of Education will disburse the available investment earnings according to the Fund Guidelines specified above.

Investment earnings shall be disbursed for the approved Purpose of Fund on the recommendation of the Dean, Faculty of Education or designate.

The Faculty of Education will make the necessary arrangements with Financial Services for the disbursement of funds.
**Amendment**

In the future, should circumstances change and cause the continuation of these Endowment Fund Terms of Reference to be inappropriate or impractical, the Board of Trustees of Queen's University, after appropriate consultation, may revise the Terms of Reference for purposes analogous to the original objective.

**Amended 07.02.26**

(Summary: The Royal Bank Visitorship and the Royal Bank Lectureship were allocated a $5000 funding limits per year.)
2.0 ADMINISTRATION AND MEMBERSHIP

2.1 Coordinator

The Coordinator will:

- be appointed by the Dean, usually for a period of 3 years (renewable) starting July 1st;
- support and encourage activities of members consistent with the Terms of Reference;
- ensure budget preparation and finances are on target;
- make decisions consistent with responsibilities outlined in the policies and procedures manual;
- call meetings of the MSTE group at least once per term;
- call meetings of the Executive Committee at least once per term;
- represent the group’s interests at various Faculty meetings, as appropriate;
- represent the group’s interests in external relations;
- provide an annual report to members and to the Dean.

2.2 Executive Committee

There will be an MSTE Group Executive Committee consisting of four members: The Coordinator of the Group and one elected member from each of the three discipline areas (Mathematics, Science and Technology Education).

The Executive Committee is to meet a minimum of once per term. Minutes will be taken and be available to all Full members, upon request of the MSTE Secretary.

MSTE Group Executive Elections Policy:

1. Election to the Executive will be from the list of Full Members as defined in the MSTE Group Membership policy.

2. The representative of a discipline area must come from the designated group.

3. Nominations for any elected position may be submitted by any Full Member of the Group and voting for each position will be open to all Full Members.

4. MSTE Executive members will be elected for three-year terms.

5. The term of office will be from July 1st of any year to June 30th of the third succeeding year.
6. An election will be held each year during the month of April following Faculty Board procedures, namely:

- A call for nominations and self-nominations will be made;
- Should there be more than one nomination for one discipline area an election will be held;
- If an election is necessary, ballots will be distributed;
- Ballots will be tabulated by a representative(s) of MSTE designated by the Coordinator.

7. Elections and terms of office will be staggered to ensure that there is only one newly-elected Executive member each year.

8. Beginning with July, 2008, the order of elections for area representatives will be Mathematics, Science and Technology Education.

9. If for any reason an Executive member is not able to serve out his or her term, a bi-election will be held within one month of receipt of the member’s resignation and the newly-elected member will serve for the remainder of the original term.

10. Should an area representative not be available, a second member from another area may be elected for a second term.

### 2.3 Membership

(a) Full Members

Any Tenured or Tenure Track Faculty or Adjunct holding a Continuing Term Appointment in the Faculty of Education who meets at least one of the following criteria:

- Teaches or has taught a CURR course addressing the Mathematics, Science, Technology Education or Computer Studies curriculum of Ontario schools - PJ or IS;
- Teaches or has taught a FOCI, EDST or FOUN course that focuses on issues concerning teaching and learning in mathematics, science and/or technology education;
- Teaches or has taught either EDUC 840 or EDUC 841;
- Has a research program that has a focus on mathematics, science or technology education.

The Dean is an ex officio member of the Group.

Full members are expected to contribute actively to the work of the Group by assuming leadership for programs; participating in seminars; collaborating in obtaining Group funding.
Full members:

- vote on policy;
- advise the Coordinator on implementation of Group policy;
- are required to use the Group name and logo in association with their MSTE related work;
- may receive funding from the Group (in accordance with Group policy) for MSTE initiatives;
- are entitled to funding obtained by the Group as a whole.

(b) Group Non-Academic Staff Members

Any member of permanent non-academic staff who meets at least one of the following criteria:

- Provides direct secretarial or administrative support for the Group;
- Provides direct support for courses in mathematics, science or technology education;
- Is directly involved in research and development funded through the Group.

Group Non-Academic Staff members will be consulted on any matters that have implications for their work, but will not be involved directly in establishing Group policy and do not have voting privileges.

(c) Associate Members

Anyone who has an ongoing affiliation with the Group:

- MSTE Fellows, Visitors, Lecturers;
- Adjunct faculty with sessional appointments teaching mathematics, science or technology education related courses;
- Participants in an MSTE initiative led by a Full MSTE member;
- Non-MSTE faculty members working with MSTE faculty members on MSTE related research;
- Graduate Students and Research Assistants studying or conducting research into questions of mathematics, science or technology education;
- Teachers involved in the conduct of Group supported research and development.
- Has a research program that has a focus on mathematics, science or technology education.

Full Members of the Group are invited to submit to the Executive the names of those they believe fit the above criteria for Associate Membership.
Associate Members are entitled to attend meetings and seminars of the Group and to participate in Group discussions except those designed to generate Group policy, and so do not have voting privileges.

Associate members may receive funding from the Group (in accordance with Group policy) if they are involved in an MSTE initiative led by a Full member of the MSTE Group.

(d) **Retired Full Members**

Anyone who is an active Full member of MSTE who retires is entitled to funding from the Group (in accordance with Group policy) if they are involved in an MSTE initiative with a full MSTE member.

They are required to use the Group name and logo in association with their MSTE related work.

They do not have voting privileges.
2.4 Current Members

Peter Chin
Science/Chemistry
Tel: (613) 533-6000 ext. 74110; e-mail: chinp@queensu.ca

Cathy Christie
Science
Tel: (613) 533-6000 ext. 74946; e-mail: christie@queensu.ca

Lynda Colgan
Mathematics
Tel: (613) 533-6000 ext. 77675; e-mail: linda.colgan@queensu.ca

Ann Marie Hill
Technology Education
Tel: (613) 533-6000 ext. 77432; e-mail: annmarie.hill@queensu.ca

Diane Lawrence
Elementary Science
Tel: (613) 533-6000 ext. 77229; e-mail: diane.lawrence@queensu.ca

Joan McDuff
Elementary Mathematics
Tel: (613) 533-6000 ext. 77363; e-mail: mcduffj@queensu.ca

Jamie Pyper
Mathematics Education
Tel: (613) 533-6000 ext 77748; e-mail: pyperj@queensu.ca

Richard Reeve
Computers in Education and Elementary Science
Tel: (613) 533-6000 ext 77206; e-mail: reever@queensu.ca

Tom Russell
Science/Teacher Development/Action Research
Tel: (613) 533-3024; e-mail: russellt@queensu.ca

Azza Sharkawy
Elementary Science
Tel: (613) 533-6000 ext. 77429; e-mail: sharkawa@queensu.ca

Peter Taylor
Cross-appointment, Mathematics Department, Queen's
Tel: (613) 533-2428; e-mail: peter.taylor@queensu.ca
2.5 Secretary

Bonnie Knox
Room A104
Tel: (613) 533-6221; e-mail: bonnie.knox@queensu.ca

2.6 Program Administrator

N/A at the moment.
2.7  MSTE Room (A302) Booking Guidelines

All use of the MSTE Room must be booked through the MSTE Secretary.

- First priority: Visitors, as their office - sponsor must book in advance;
- Second priority: MSTE business (meetings);
- Third priority: MSTE members for MSTE related activities;
- Fourth priority: MSTE members for other activities;
- Fifth priority: MSTE drop-ins.

Note: This room may not be used as a general classroom (nor for classroom purposes by MSTE members.)

2.8  MSTE Funding Review protocol

The MSTE Executive reviews funding requests at its monthly meeting on the third Wednesday of each month, from September to June.

All funding requests less than $5000 will be reviewed at monthly Executive meetings. All funding requests greater than $5000 will be reviewed quarterly in September, December, March, and June Executive meetings.

All requests for funds must be received by the MSTE Secretary seven (7) days in advance of the scheduled Executive meeting. Late submissions will not be reviewed until the next scheduled Executive meeting.

In extenuating circumstances, the Coordinator will review and decide upon the approval and amount of a funding request. Such decisions will be presented to the Executive at the next scheduled Executive meeting, for discussion/confirmation/oversight purposes.
3.0 RESEARCH AND DEVELOPMENT ACTIVITIES

3.1 Fellowships, Lectureships, and Visitorships

Criteria

(i) RBC Fellowship
The terms of reference for the RBC National Teaching Fund in Mathematics, Science & Technology Education support the awarding of funding for Fellowships under the following terms:

- The Fellowships allow outstanding practitioners from the field of education to reside at the Faculty and contribute to the work of the MSTE Group;
- The Fellowships are awarded by the MSTE Executive Committee;
- The Fellowships provide for senior educators to spend an extended length of time (to a maximum of three months) at the Faculty;
- The MSTE sub-group or individual sponsoring the Fellow is responsible for arranging the visit.

(ii) RBC Lectureship
The Lectureship is awarded by the MSTE Executive Committee. The Lecturer will give one major public lecture and be available to the University community as a whole. The Executive Committee arranges the visit.

(iii) RBC Visitorship
Visitors falling into this category are those visiting MSTE Group members or others at Queen’s University in connection with activities beyond MSTE, and while here have offered to lead MSTE sponsored seminars, lectures or workshops. They may also be invited for a specific purpose by an MSTE member (see below).

(iv) Teaching Fellowship
Awarded in collaboration with the Faculty Teaching Fellowship Committee.

Application procedure

(i) Fellowships (Scholar or Teaching Fellow)
MSTE sub-groups or individual members will apply for support for a Fellow by completing the Application for a Royal Bank Fellowship form (see Appendix C). Maximum funding: $15,000.00. Monthly stipend of $1,000.00 plus travel and accommodation costs.

(ii) Lectureship
- Call goes out to whole Group for suggestions;
- Visitor is selected by the Executive Committee.
(iii) Visitors
Visitors fall into two categories; Invited Visitors and Ad Hoc Visitors.

(a) Invited Visitors are here at the direct request of MSTE members for a maximum period of five days. The MSTE host member submits the completed proposal form (see Appendix D) and detailed budget to the Coordinator at least one month in advance of visit. If there are MSTE Group functions/events planned, it is incumbent upon the MSTE host member to provide as much lead time as possible for planning, organizing, and implementing public activities (i.e., do not wait until the Visitor arrives to inform the Coordinator of possible Group or public activities.) Maximum funding $5,000.00. Applications are vetted by the Coordinator.

(b) Ad Hoc Visitors are visiting particular MSTE faculty members on an ad hoc basis and will participate in an MSTE-sponsored seminar while here for a period of three days maximum. Host submits proposal form (see Appendix D) and detailed budget to the Coordinator at least one month in advance of the visit. (In extenuating circumstances requiring a shorter notification time, submit proposal to Coordinator directly with a rationale and explanation.) Provide necessary details to allow for either issuing an honorarium cheque or for partial reimbursement of expenses. A visitor’s compensation is at the rate of $500 for the first day/session and $250 per day for up to 2 days on the condition that he or she is involved in at least one “event” on each of these days. Funds may be used for travel, accommodation, meals, or an honorarium.

3.2 Doctoral Scholarships

3.2.1 Doctoral Fellowship

Criteria
The MSTE Group acknowledges the importance of encouraging a cadre of doctoral scholars in the field of MSTE. In an attempt to recognize this, the Group will offer an incentive scholarship to an outstanding candidate: A one-time payment to be paid in two equal installments of $2,500.00, to be paid September 15th and January 15th. This payment should be a top-up and not a reduction in the funding package allocated by the Office of Graduate Studies and Bureau of Research.

Application procedure
Appropriate applications to the Graduate Program will be submitted to the MSTE Executive for consideration.
3.2.2 MSTE Apprenticeship

Criteria

The MSTE Group acknowledges the importance of encouraging graduate student scholars in the fields of MSTE. This Apprenticeship is an investment in people and ideas. To recognize this, the Group will offer an incentive scholarship to an outstanding candidate: A payment of $5,000 will be made in two equal installments of $2,500.00, to be paid September 15th and January 15th. This payment will be an addition, and will not result in a reduction, to the funding package allocated by the Office of Graduate Studies and Bureau of Research.

MSTE Apprenticeship responsibilities

The purpose of this Apprenticeship is to provide opportunities for doctoral students to gain depth and breadth of experience in MSTE focused issues. Leadership, organization, and professional community building in the MSTE context are key aspects of the intended outcomes of this Apprenticeship.

The MSTE Apprentice would be responsible and accountable to the Coordinator (or designate) to work on a variety of MSTE Group initiatives and activities in order to address MSTE Group needs, as directed by the Coordinator (or designate).

Such activities may include but are not limited to: attend monthly Executive meetings as a non-voting member; manage communications such as the annual e-zine, webpage materials; liaise with the Faculty Communication coordinator about MSTE Group and member activities; assist with grant and funding applications. (Minimum 100 hours per term.)

Application procedure

MEd and PhD candidates in their second or later year of their graduate program are eligible. The Manager of the Graduate Program will assist to identify suitable candidates with a mathematics, science, and/or technology education focus, and information of the availability of the Apprenticeship will be made known to graduate students. Applicants will provide a letter of interest outlining their suitability for the Apprenticeship, a cv, and any other documentation they feel is pertinent and relevant. The MSTE Executive will decide who is offered the Apprenticeship.

An Apprenticeship is not a guaranteed award each year.
3.3 Curriculum Materials development, dissemination and research

Criteria

- Impact on teaching, learning, and/or assessment must be made evident;
- Proposal must include criteria for assessing the impact of the project;
- Project must result in a tangible product;
- All curriculum materials produced will be copyrighted to MSTE;
- Both individual and group projects will be considered;
- Project should provide either local, national or international visibility for MSTE;
- Full budget and rationale proposal required (see Appendix E);
- Full funding for each project may not be available (adjustments for smaller budget or some sort of matching funds helpful);
- MSTE teaching buy-out policy applies;
- The MSTE logo is to be visible on all materials.
- Project leader must be a full member of MSTE.

Application and Accounting procedure

Full proposal using Appendix E, with rationale and budget breakdown, will be required. Once proposal has been submitted to the MSTE Coordinator it will be briefly checked for completeness prior to being forwarded to an adjudication committee, as required.

Submit original receipts/invoices for expenses to the MSTE secretary for reimbursement/payment.

3.4 Workshops and Activities for Teacher Candidates, Faculty and Other Educators or associated people.

Criteria

The workshop should advance curriculum development or teaching and learning in Mathematics, Science or Technology Education. There must be a registration process, and there may be a fee to cover materials and incidental costs at the discretion of the organizer.
- Proposal must include criteria for assessing the impact of the project;
- All curriculum materials produced will be copyrighted to MSTE;
- Both individual and group projects will be considered;
- Full budget and rationale proposal required (see Appendix P);
- Full funding for each project may not be available (adjustments for smaller budget or some sort of matching funds helpful);
• The MSTE logo is to be visible on all materials.
• Project leader must be a full member of MSTE.

Intended outcomes

• Advances the mission of the MSTE Group;
• Summary report to be submitted to Coordinator within one month.

Application and Accounting procedure

• Submit a written proposal and proposed budget for Coordinator approval using budget form (see Appendix P);
• Submit original receipts/invoices for expenses to the MSTE secretary for reimbursement/payment.

3.5 Conferences and Workshops

3.5.1 Conferences organized by MSTE Members

Criteria

• Principal organizer must be a Full member of MSTE;
• The conference has to advance scholarship, curriculum development, teaching and learning in Mathematics, Science and Technology education;
• Provide rationale and intended audience;
• May involve local, national and international participants;
• Participants must register and pay a fee;
• Participants should be provided with an evaluation sheet and a summary of this should be sent to the MSTE Coordinator.
• The MSTE logo is to be visible on all materials.
• Provide post-conference report to Coordinator/Group;

Application and Accounting procedure

• Provide a written letter of intent one year in advance of the event for it to be considered in the annual budget;
• Submit proposal and proposed budget to Coordinator using budget form, Appendix P;
• Submit original receipts/invoices for expenses to the MSTE secretary for reimbursement/payment.
3.5.2 External Events organized by MSTE Members

Criteria

- Principal organizer must be a Full member of MSTE;
- The external event has to clearly advance scholarship, curriculum development, teaching and learning in Mathematics, Science and Technology education, according to the RBC Terms of Reference;
- Provide rationale and intended audience;
- May involve local, national and international participants;
- Participants may be required to register and may pay a fee;
- Participants should be provided with an evaluation sheet and a summary of this should be sent to the MSTE Coordinator. (Evaluation details are to be made available upon request.)
- The MSTE logo is to be visible on all materials.
- Provide post-event report to Coordinator/Group.

Application and Accounting procedure

- Provide written letter of intent one year in advance of the event for it to be considered in the annual budget;
- Submit a full, detailed, proposed budget to Coordinator using budget form Appendix P;
- Identify all other funding, monetary and in-kind (with an approximate dollar value), along with the names and contact information of these other funding sponsors;
- Clearly identify the budget lines that align with MSTE/RBC Terms of Reference to be considered for funding;
- No funding advances are available;
- Submit original receipts/invoices for expenses to the MSTE secretary for reimbursement/payment.

3.5.3 Conference Travel

Criteria

There are two options for funding Conference Travel.

1. A Group member who attends a conference or event as the official representative of the MSTE Group will have all expenses reimbursed. A proposal with an explanation and rationale for the member’s identification as an official representative must be submitted with the funding application. The
Executive will consider the application and proposal and determine if the funding request is appropriate for this option, or for option #2 below. This in no way affects maximum funding for conferences. Any Group member who attends a conference or event as the official representative of the MSTE Group will be expected to submit a formal report to the Coordinator. These reports will be made available to the Group at the next Group meeting.

2. A Group member who plans to attend a conference where he or she will give a paper that reports on a project or research directly connected to MSTE activities may apply for funding from MSTE Group (Royal Bank) funds. The following criteria will be taken into account in making any decision concerning support:

(a) The acceptance notice(s) and the conference webpage/flyer information;

(b) The paper and conference presentation must clearly make the connection between the project or research and the MSTE Group;

(c) The applicant must agree to submit to the MSTE Group office a copy of the presented paper and a copy of the paper as it appears in any conference proceedings or text to emerge from the conference;

(d) The conference must hold the potential to make the MSTE Group known to a new, extended audience and hold the potential for new links between Group members and researchers at other institutions;

(e) The applicant must show that an attempt has been made to secure funding from other sources and account for the inability to obtain sufficient assistance;

(f) If the project or research is receiving funding from other sources, either within the MSTE Group (e.g., Imperial Oil) or outside the Group (e.g., SSHRC), then the applicant will be expected to cover some of his or her expenses from these sources.

Maximum funding allowed

The maximum amounts available to any member will be:
(i) the lesser of $2,500.00 or one-half of costs per conference;
(ii) $2,500.00 in one financial year.
**Application and Accounting procedure**

Submit a proposal explaining the choice of option 1 (along with responses to the above option 2 items as necessary), or option 2 (along with responses to all of the above items). Submit a completed University Travel form.

All funding request forms and supporting documentation to be submitted to MSTE secretary and Coordinator for approval.

**Note:** Information concerning all funding granted under this policy will be included in the annual report to Group members.

Submit original receipts/invoices for expenses to the MSTE secretary for reimbursement/payment.

### 3.5.4 Conferences attended by MSTE Full Members: Special Collaboration Opportunity

The intent of this conference travel funding is to increase graduate student, B.Ed. student, (and in exceptional cases approved by the Coordinator and Executive with an explanation and rationale, an undergraduate student) collaboration and participation in MSTE knowledge creation and mobilization.

This is a short term funding opportunity that can be terminated and/or changed without notice by the Coordinator. Collaboration with a graduate, or B.Ed. (or possibly undergraduate) student is a requirement of this funding.

Every Full and Associate member of MSTE will have an initial $2000 available for conference travel. This can be a field or research conference. If the MSTE member subsequently publishes in a field or research journal, an article that comes from their participation in the conference, then the member will be eligible for $2000 for the same purpose in the next school year. The monies can be used for travel, registration, funding for a student collaborator to co-participate and, it is expected, to be part of the authoring of the article.

Use Appendix P1 for this request.
3.6 Teaching Release

Criteria

Teaching Release (Buyouts) funded through MSTE:

1. When external project funding is obtained by the MSTE Group and a faculty member is named as leader of a related project the maximum teaching buyout that will be permitted is 0.5 credit unless the faculty member has specifically negotiated more release time with the funding agency.

2. Notices of proposed teaching release applications must be provided to the Coordinator prior to submitting request to the Dean.

3. Requests for buyouts must be fully justified and will be approved by the Dean.

4. At the end of the buyout period any MSTE Group member receiving a buyout will provide the Dean and the Coordinator of MSTE with a written report concerning the outcome of their work. This report will be specific to the funded project and should not be mixed with projects funded by any other sources.

Application procedure

Submit request to the Dean, copied to the Coordinator.

Submit a copy of the Approval to the Coordinator.
4.0 EXTERNAL RELATIONS

4.1 Donations for External Activities

Criteria

Activities must further teaching, learning, and the goals of MSTE.

Application procedure

Individual requests will not normally exceed $1000.00. Submit request with the appropriate rationale and description and budget details to the Coordinator.

The Coordinator may approve on an ad hoc basis up to $2,000.00 total annually. Anything over $2,000.00 must go to Executive Committee for consideration.

4.2 Website

http://educ.queensu.ca/mste
Title of Event: __________________________ Date of Event: _____________

Provide an Event Proposal (a rationale and description of the event) on a separate page.

(Type and expand each section as needed).

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publicity (Provide explanation/rationale)</td>
<td></td>
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<tr>
<td>Press advertising:</td>
<td></td>
<td></td>
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<tr>
<td>Posters/flyers etc. - printing:</td>
<td></td>
<td></td>
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<tr>
<td>photocopying:</td>
<td></td>
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<tr>
<td>Catering Services (Provide explanation/rationale)</td>
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<tr>
<td>Break refreshments:</td>
<td></td>
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<tr>
<td>Breakfast:</td>
<td></td>
<td></td>
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<tr>
<td>Lunch:</td>
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<tr>
<td>Supper:</td>
<td></td>
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<tr>
<td>Guest Speakers</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Honorarium:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel &amp; subsistence:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human Resources (Provide explanation/rationale) (e.g. evening/weekend overtime)</td>
<td></td>
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<tr>
<td>Administrative support:</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Security guard (a weekend requirement):</td>
<td></td>
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<tr>
<td>IT &amp; A/V Services (Provide explanation/rationale)</td>
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<tr>
<td>Technician:</td>
<td></td>
<td></td>
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<tr>
<td>Equipment:</td>
<td></td>
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<tr>
<td>Conference handouts (Provide explanation/rationale) (e.g., CDs/DVDs, gifts, prizes)</td>
<td></td>
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<tr>
<td>Other (Provide explanation/rationale)</td>
<td></td>
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</tr>
</tbody>
</table>

TOTAL COSTS: $________

☐ I understand all reports and outcomes will be displayed on the MSTE webpage and or other MSTE display venues.

Signature of Applicant: __________________________ Date: __________________

Submit completed form to MSTE Coordinator via MSTE Secretary
Application for a Royal Bank Fellowship
Faculty of Education, Queen's University

Title of Project:

Name and Address of Applicant: Faculty of Education, Queen's University

E-mail Address of Applicant:

Name and Address of Visiting Scholar:

E-mail Address of Visiting Scholar:

The Visiting Scholar
(Provide a brief biographical statement of the Fellow)

Dates for which Funds are requested:

Date of this Application:

Purpose of the Fellowship:

Intended Outcomes:

(a) Final report
Recipients are required to submit a final report to the Dean of Education and the Coordinator of the MSTE Group outlining the results of their Fellowship. This report can be in any form the recipient deems most useful for communicating the results coming from the Fellowship. Your submission of this application, and your signature below, indicate your acceptance of this obligation as a condition of the award.

(b) Other outcomes
Applicants are required to describe the outcomes of the Fellowship. These outcomes may include products (e.g., curriculum materials, journal articles, websites, artifacts), presentations (to Faculty, students, teachers and others), and dissemination activities.

• Products

• Presentations

• Dissemination
Detailed Budget
(Expand and provide details as necessary -- with email/screen prints/etc. of supporting documentation.)

<table>
<thead>
<tr>
<th>Item and Details</th>
<th>Cost (C$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Fare</td>
<td></td>
</tr>
<tr>
<td>Accommodation (specify)</td>
<td></td>
</tr>
<tr>
<td>Food</td>
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<tr>
<td>Local travel</td>
<td></td>
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<tr>
<td>Consumable materials</td>
<td></td>
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<tr>
<td>Graphic design</td>
<td></td>
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<tr>
<td>Office supplies</td>
<td></td>
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<tr>
<td>Photocopying</td>
<td></td>
</tr>
<tr>
<td>Honorarium</td>
<td></td>
</tr>
</tbody>
</table>

Total

☐ I understand all reports and outcomes will be displayed on the MSTE webpage and or other MSTE display venues.

Signature(s) of Applicant(s): ________________________________

Date: ________________________________

Submit completed form to MSTE Coordinator via MSTE Secretary
APPENDIX D

Application for an Invited Visitor, Lecturer
Faculty of Education, Queen's University

Title of Project:

Name of MSTE Sponsor: Faculty of Education, Queen’s University

E-mail Address of MSTE Sponsor:

Name and Address of Invited Visitor/Lecturer:

E-mail Address of Invited Visitor/Lecturer:

Dates for which Funds are requested:

Date of this Application:

Purpose of the Visit:
(Refer to page 11 of MSTE Policies & Procedures RBC Visitorship for criteria.)

The Visitor/Lecturer:
(Provide a brief biographical statement of the Visitor.)

Detailed Budget
(Expand and provide details as necessary -- with email/screen prints/etc. of supporting documentation.)

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost (C$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Fare</td>
<td></td>
</tr>
<tr>
<td>Accommodation (specify)</td>
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<tr>
<td>Food</td>
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<td>Local travel</td>
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<td>Consumable materials</td>
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<td>Graphic design</td>
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<tr>
<td>Office supplies</td>
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<tr>
<td>Photocopying</td>
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<tr>
<td>Honorarium</td>
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</tbody>
</table>

(Maximum of $5000, as per RBC Terms of Reference) Total

☐ I understand all reports and outcomes will be displayed on the MSTE webpage and or other MSTE display venues.

Signature(s) of MSTE Sponsor(s): ________________________________

Date: ________________________________

Submit completed form to MSTE Coordinator via MSTE Secretary
CURRICULUM DEVELOPMENT, PROFESSIONAL DEVELOPMENT AND SCHOLARSHIP PROJECTS APPLICATION FORM

N.B. If funding request is for capital projects please submit a separate description and budget rather than filling in this form.

<table>
<thead>
<tr>
<th>Applicant(s)</th>
<th>Position(s) e.g., Tenured/Continuing appointment</th>
<th>E-mail</th>
<th>Telephone</th>
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</table>

Signature(s) of applicant(s): __________________________________________
________________________________________________________________
________________________________________________________________
________________________________________________________________

Date: __________________________________________________________
1. **PROJECT* PROPOSAL** (maximum three pages in 12 pt. font)

Please describe the proposed project, indicating the title, rationale and anticipated impact in schools (with references to the relevant literature). Include plans for dissemination and publication of results.

* While research is not fundable, program/project evaluation is.

2. **ETHICS**

Is ethics clearance required?  NO    YES

If yes, status: _______________________________________

(complete/available/in progress)

3. **CURRICULUM VITAE**

Append a short copy of your CV which includes a list of publications and grants.

4. **SUMMARY OF COSTS** (detailed in Section 5a to 5f)

<table>
<thead>
<tr>
<th>Proposed budget for period of project:</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) Personnel</td>
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<tr>
<td>(b) Books and materials</td>
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<tr>
<td>(c) Use of specialized research equipment</td>
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<td></td>
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<tr>
<td>(d) Travel and subsistence</td>
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<tr>
<td>(e) Dissemination expenses</td>
<td></td>
<td></td>
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<tr>
<td>(f) Conference/workshop organization</td>
<td></td>
<td></td>
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<tr>
<td><strong>TOTAL:</strong></td>
<td>$</td>
<td>$</td>
<td>$</td>
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</tbody>
</table>
5. DETAILED ACCOUNT OF COSTS

(a) Personnel
Specify period of employment and hourly payment rate. 10% of payments to personnel must be added to cover Canada Pension Plan and Unemployment Insurance deductions (Benefits). Please explain in the space provided what tasks personnel will perform.

<table>
<thead>
<tr>
<th>No.</th>
<th>Role and responsibilities</th>
<th>Period of employment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Graduate Research Assistants</td>
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</tbody>
</table>
|     | Other Personnel  
(Specify, e.g. visiting scholars, conference presenters, clerical staff) |                      |
| Category (e.g., Graduate student, technician, web designer) | Rate per hr. | Total salary | Benefits @ 10% | Total cost |
|     |                           |                      |                  |               |

Total costs (a): $
(b) Books and materials

Provide details:

<table>
<thead>
<tr>
<th>Purpose of travel</th>
<th>Destination</th>
<th>Duration of visit</th>
<th>Mode of transport</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

Total costs (b): $

(c) Use of specialized equipment

(Evidence required that equipment not available in Faculty)

Provide details:

Total costs (c): $

(d) Travel and subsistence

(e.g. for data collection, testing materials, or presenting related scholarly work). Use Faculty rate for travel and University rate for subsistence.

<table>
<thead>
<tr>
<th>Purpose of travel</th>
<th>Destination</th>
<th>Duration of visit</th>
<th>Mode of transport</th>
<th>Cost</th>
</tr>
</thead>
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</tbody>
</table>

Travel: $
<table>
<thead>
<tr>
<th>Hotel/No. of nights</th>
<th>Cost</th>
<th>Meals/refreshments costs</th>
<th>Total costs</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

Subsistence: $\

Total costs (d): $\

(e) Dissemination

<table>
<thead>
<tr>
<th>Production (e.g. print, A/V):</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Photocopying</td>
<td>$</td>
</tr>
<tr>
<td>Distribution</td>
<td>$</td>
</tr>
</tbody>
</table>

Total costs (e): $\

(f) Conference/Workshop organization
(see Conference organization budget form)

| Publicity/advertising:       | $ |
| Catering:                    | $ |
| Human Resources:             | $ |
| A/V Services:                | $ |
| Speakers’ fees/expenses:     | $ |
| Miscellaneous (e.g. handout materials): | $ |

Total costs (f): $
6. PARTIAL SUPPORT

Indicate how partial funding could be beneficial to your proposed research project. If only partial funding is available, please indicate which part(s) of the budget could be reduced.

☐ I understand all reports and outcomes will be displayed on the MSTE webpage and or other MSTE display venues.

Signature(s) of Applicant(s): __________________________________________

Date: ______________________________________________________________

Submit completed form to MSTE Coordinator via MSTE Secretary
Internal Application for MSTE Conference funding
Faculty of Education, Queen’s University

As of Fall 2012: The intent of this conference travel funding is to increase graduate student, B.Ed. student, (and in exceptional cases approved by the Coordinator and Executive with an explanation and rationale, an undergraduate student) collaboration and participation in MSTE knowledge creation and mobilization. This is a short term funding opportunity that can be terminated and/or changed without notice by the Coordinator. Collaboration with a graduate, or B.Ed. (or possibly undergraduate) student is a requirement of this funding.

Title of Project: 

Name and Office# of Applicant: Faculty of Education, Queen’s University

E-mail Address of Applicant: 

Dates for which Funds are requested: 

Date of this Application: 

Purpose of the Conference: 

Name and e-mail address of collaborating undergrad/grad student(s): 

-----

Intended Outcomes:

Final report
Recipients are required to submit a final written report to the Coordinator of the MSTE Group outlining the results of their Conference participation. For subsequent conference funding recipients are required to publish an article that results from their participation in the conference in a field or research journal. A copy of the published article, or evidence that it is ‘in press’, is to be submitted to the Coordinator of the MSTE Group prior to submitting the next request for conference funding. Your submission of this application, and your signature below, indicate your acceptance of this obligation as a condition of the award.
Detailed Budget (with email/screen prints/etc supporting documentation)

<table>
<thead>
<tr>
<th>Item</th>
<th>Details</th>
<th>Cost (C$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air/Rail/Car Fare</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation (specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local travel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other items</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

☐ I understand all reports and outcomes will be displayed on the MSTE webpage and or other MSTE display venues.

Signature(s) of Applicant(s): ____________________________________________

Date: ____________________________________________

Submit completed form to MSTE Coordinator via MSTE Secretary
Application for MSTE Funding Request
Faculty of Education, Queen’s University

The Mathematics, Science, and Technology Education Group (MSTE) is a research and development team that is dedicated to improving teaching and learning in the mathematics, science, and technology fields in schools and in teacher education.

Title of Project: ___________________________ End Date: ___________________________

Start Date: ___________________________ (For funding management purposes; unspent funds will be reallocated after the End Date)

Name of MSTE Sponsor: Faculty of Education, Queen’s University

E-mail Address of MSTE Sponsor: ___________________________

This project falls under the following funding protocol (see the MSTE Policy and Procedures document for details, http://educ.queensu.ca/mste)

Check the appropriate box

3.1 MSTE/RBC Fellowship (max. $15000)
3.1 Visitorship
Invited Visitor (max. $5000)
3.1 Lectureship
Ad Hoc Visitor (max. 3 days, $500+$250+$250)
3.4 Workshops and activities for Teacher Candidates, Faculty and other Educators or associated people. (registration required and fee optional)
3.5 Conferences and workshops
3.5.1 Conferences organized by MSTE members
3.5.2 External events organized by MSTE members
3.5.3 Conference travel
1. as an official representative of MSTE
3.5.3 Conference travel
2. as a result of an MSTE initiative; the lesser of $2500 or one-half of costs per conference; max $2500 per year

Temporary opportunity:
Special Workshops for Teacher Candidates (one request per term, up to $500 per section of the course taught)

4.1 Donations for External Activities (usual max. $1000)

Dates for which funds are requested:

Date this application was submitted to MSTE:
(Must be submitted by the second Wednesday of the month to be considered by the Executive at the next meeting)

Purpose of the event/activity/visitor:
(Attach a separate page for the detailed proposal describing the background, purpose, and intent of the event/activity/visitor)
Name and address of visitor/group:

E-mail address of visitor/group lead:

The visitor and/or group
(Provide a biographical statement, use a separate page if necessary)

Intended Outcomes:

(a) Final report
MSTE Sponsors are required to submit a final report to the Coordinator of the MSTE Group (via the MSTE Secretary) outlining the results of their event/activity/visitor. This report can be in any form the recipient deems most useful for communicating the results coming from the event/activity/visitor, however, the minimum is a written report. Your submission of this application, and your signature below, indicate your acceptance of this obligation as a condition of the funding.

(b) Other outcomes
Applicants are required to describe the outcomes of the event/activity/visitor. These outcomes may include products (e.g., curriculum materials, journal articles, websites, artifacts), presentations (to Faculty, students, teachers and others), and dissemination activities (i.e., knowledge mobilization).

Provide details for the following:
• Products

• Presentations

• Dissemination/Knowledge mobilization

Detailed Budget
(It is necessary to expand and provide details)

<table>
<thead>
<tr>
<th>Item and Details (actual amounts and estimates must be supported with appropriate documentation – e.g., email/screen prints/etc.)</th>
<th>Cost (C$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Fare/Train/Other Vehicle</td>
<td></td>
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<tr>
<td>Accommodation</td>
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<td>Honorarium</td>
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<td>Food</td>
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<td>Break refreshments</td>
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<td>Breakfast</td>
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<td>Lunch</td>
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<tr>
<td>Dinner</td>
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<td>Local travel</td>
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<tr>
<td>Consumable event materials (paper, CD/DVD, etc.)</td>
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<tr>
<td>Graphic design &amp; Publicity</td>
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<tr>
<td>Office supplies</td>
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<td>Photocopying</td>
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<tr>
<td>Human Resources (e.g., Administrative support, security guard)</td>
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<tr>
<td>IT &amp; A/V Services (e.g., technician, equipment)</td>
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</tbody>
</table>

Total

☐ I understand all reports and outcomes will be displayed on the MSTE webpage and or other MSTE display venues.

Signature(s) of MSTE Sponsor(s):

_____________________________________________________

Date: ____________________________________________________

Submit completed form to MSTE Coordinator via MSTE Secretary