



MATHEMATICAL ASSOCIATION OF AMERICA

MAA

PROGRAMS

OPEN Math

Online Professional Enhancement
and Capacity Building for Instructional
Practices in Undergraduate Mathematics

2024 Workshop Leader's Handbook

MAA OPEN Math Workshop Leader's Handbook

Preface and Timeline.....	3
1. About the OPEN Math Project.....	4
1.1 Proposing a Workshop for MAA OPEN Math.....	5
1.2 Request to Repeat a Program.....	8
1.3 Selection Committee Rubric.....	9
1.4 Winter Planning Meetings.....	10
2. Strategies for Online Professional Development.....	10
2.1 Key Elements/Strategies of Workshop Facilitation.....	10
2.2 Getting Feedback as You Go: Formative Assessment Ideas.....	11
2.3 Follow-up Support.....	12
3. Workshop Evaluation.....	13
3.1 What is the Evaluators' Role?.....	14
3.2 What is the Evaluation Design for OPEN Math?.....	14
3.3 What do the Evaluators Need from Workshop Teams?.....	17
4. The Role of MAA Staff.....	19
4.1 Finding your Workshop Participants.....	19
4.2 Supporting Communication with Participants.....	20
4.3 Process Applications to Attend Programs.....	22
4.4 Cancellation of a Program.....	22
4.5 Participant Registration Fees.....	22
4.6 Support Evaluation Activities.....	23
5. The Role of a Workshop Director.....	23
5.1 Offer a High-Quality, Sustained Faculty Development Experience.....	23
5.2 Communicate with the MAA.....	24
5.3 Communicate with Participants.....	24
5.4 Promote your Program.....	24
Appendices.....	26
Appendix A: Outline for the Winter Planning Meetings.....	26
Appendix B: Reimbursement of Expenses.....	29

MAA OPEN Math

Workshop Leader's Handbook

Preface and Timeline

This handbook is a mashup of the old MAA PREP workshop director's Guide, the current documentation from the Committee on Virtual Programming, and the AIBL Handbook¹. The project website <http://maa.org/open-math> includes information on past workshops that might be helpful. The rough timeline for the program is given below – note that Learning Community models are not included in the timeline since they might start and stop at any time, but the timeline for those are consistent with what is shown below for summer workshops.

OPEN Math Timeline

Early August

- Advertising the “Request for Proposals” (RfP)

Early October

- Free webinar event to discuss RfP

Late October

- Proposals are due
- Advisory Board meeting

Early November

- Selection committee meeting

Late November

- Notification of acceptance of workshop

Early December

- FOCUS deadline for title and tentative date information

Late January / Early February

- Deadline for workshop leaders to confirm dates and provide information for the marketing/communication plan

Mid-February

- Registration pages built and communication planned
- Early registration opens, messaging goes out to select audiences
- Workshop leaders are asked to identify other communities

February-ish

- Three Winter Planning Meetings (WPM). Customized follow-ups will be scheduled with each team when the workshops are closer at hand.

Mid-March

¹ Daly, D., Ethnography & Evaluation Research, & the Academy of Inquiry Based Learning. (2021, June). *AIBL Handbook for Online Professional Development: Lessons Learned from PRODUCT Workshops*. Boulder, CO, and San Luis Obispo, CA: University of Colorado Boulder, Ethnography & Evaluation Research; and Academy of Inquiry Based Learning. <https://tinyurl.com/AIBLHandbook>

- Regular registration opens
- Workshop leaders are asked to help spread the word. MAA provides template emails, graphics, and social media suggestions
- Workshops are capped at 28 so they can come down to 25ish through attrition. We will keep them there through mid-April, and then only go back to waitlists if they fall below 25.

Mid April

- Initial deadline for registration

Each workshop will have support from MAA staff on roughly this schedule:

- About 30 days before the workshop starts, MAA generates a participant list and shares it with workshop leaders and CU-Boulder group. This list may change slightly if individuals withdraw and are replaced.
- About _____ before the workshop, MAA sets up Google group and google file space for the workshop. They will also set up a “technology check” with workshop facilitators.
- Immediately following the workshop, MAA staff will send forms for reimbursement and stipend payments.

Each workshop will also receive communication from the CU-Boulder evaluation team:

- A few weeks before the workshop, CU-Boulder emails the **participant list** to complete the pre-workshop baseline survey on Initial knowledge, skills, attitudes about professional development, professional background, work context, & personal demographics.
- Also a few weeks before the workshop, CU-Boulder emails **workshop leaders / facilitators** for baseline information on your initial knowledge, skills, attitudes about professional development, professional background, work context & personal demographics
- **Please save the last 30 minutes on your final workshop day for in-session evaluation activities.**
- Immediately after the workshop, workshop leaders/facilitators are also contacted for information on workshop implementation & leader learning, workshop experience, knowledge, skills, attitudes about PD, implementation plans, advice to the project leadership

1. About the OPEN Math Project

The Mathematical Association of America’s OPEN Math project (Online Professional Enhancement and Capacity Building for Instructional Practices in Undergraduate Mathematics) is a comprehensive, professional career enhancement project funded by the National Science Foundation (NSF) Division of Undergraduate Education, grants DUE-2111260 and DUE-2111273.

A primary focus of MAA OPEN Math is online delivery of effective, professional development activities focused on teaching and inclusive classroom practices, with a commitment to evaluation of these activities to inform future leaders about best practices for online professional development. The primary audience for OPEN Math workshops comprise mathematical

sciences instructors from all types of post-secondary institutions, including two-year colleges, liberal arts colleges, comprehensive universities and research universities. OPEN Math workshops are equally available to all faculty, independent of whether or not they are members of the MAA or any other professional organization. Because of the format's accessibility, OPEN Math workshops are particularly attractive to those instructors whose employment or personal situation make traditional face-to-face professional development difficult. The OPEN Math project strives to reach these individuals, in particular.

The OPEN Math project is a collaboration between MAA and the Evaluation and Ethnography Research.

For questions about MAA OPEN Math, contact:

Doug Ensley, dougensley@gmail.com

Director of MAA OPEN Math (Principal Investigator for NSF #2111260)

Sandra Laursen, sandra.laursen@colorado.edu

Director of E&ER at University of Colorado Boulder (Principal Investigator for NSF #2111273)

MAA Programs Department, programs@maa.org

1.1 Proposing a Workshop for MAA OPEN Math

All OPEN Math summer workshops have several common components:

- Focus on instructional practices
- Focus on inclusion
- Measurable learning outcomes for participants
- Active engagement of participants
- On-going or follow-up component

The request for proposals (RfP) is posted each year in late summer, and the deadline for responding is at the end of October. The review process happens in early November so that notification of acceptance can be made on or about December 1.

Here are the prompts for the RfP. The next section describes the rubric by which our selection committee evaluates responses to these prompts

Title, description, and intended audience

Please provide a workshop title that is concise but makes the topic clear and gets the attention of the intended audience. There will be places where only the workshop titles appear (with links, of course).

Please provide a full description (400 word limit) of your workshop that should appear on a registration page for this event.

Please provide a short description (200 word limit) of your workshop that can be used for advertising and marketing this event – this description will be used when all the workshops appear in a single scrolling list.

Who is the intended audience for your workshop? If you know of particular SIGMAAs, MAA Connect communities, or any non-MAA groups/organizations who will be interested, please list them here. Also, let us know if this work is connected to a grant or other project for which this workshop will support with dissemination and outreach. This will help us better understand your overall plans and provide a starting point for an advertising effort for your workshop.

Workshop Content: Learning objectives related to active-learning pedagogy

Use responses to these prompts in scoring the rubric items above

- Elevator pitch: In one paragraph, summarize the overall, big goals for your workshop, where the audience is a Selection Committee (composed of a variety of college mathematics instructors) who will be considering many different types of workshops. What makes yours distinct? timely? in demand? likely to have a big impact?
- What active and research-based pedagogies or practices are central to what workshop participants will learn? What part(s) of the IP Guide will you draw on? Are there any other resources you plan to use to support participants' effective application of your topic? Please include specific linkage to the MAA Instructional Practices Guide or other appropriate references to evidence-based teaching practices. Note that the point here is not so much about boosting the MAA IP Guide specifically as it is to tying pedagogical practices to educational research.
- List 4-6 specific learning objectives for your workshop – what knowledge, skills, beliefs, etc from your workshop will help participants make progress toward implementation of the ideas in their classrooms? For evaluation purposes these objectives should be clear to any post-secondary mathematics instructor, should be realistic and measurable, and should be stated in terms of active verbs. Be aware that individual reviewers may not be familiar with acronyms and jargon specific to your area. The OPEN Math evaluation and research team will use these to develop survey items that are specific to your workshop, along with a set of general items for all the OPEN Math workshops.

Workshop Activities

- We're asking workshop teams to follow one of the tested formats described below. This link provides examples of previous workshops that use formats #1 and #2. This link provides an example of a learning community model (format #3). Which format seems like the best fit for your team and your topic?

Note: In the format choices below, the 'time per day' includes the breaks. So, for example, "6-hour day" could consist of 5 hours of contact and 1 hour of breaks, and the "3-hour day" might be two 80-minute sessions with a 20-minute break in the middle.

- Format choice #1: intensive workshop (roughly 6 hours per day for 4 days within one week) with 3 hours of followup over the subsequent academic term. Some groups have had success with having their meetings on either side of a weekend.
- Format choice #2: extended mini-course (roughly 3 hours per day for 3 days per week for three weeks) with 3 hours of followup over the subsequent academic term
- Format choice #3: Learning Community model consisting of 3-4 hours of meetings before a semester followed by regular (every N weeks) meetings throughout the semester. This model is appropriate when participants will actively implement some pedagogical innovation during a semester and meet as a group for feedback and support.
- Give us some options for when you'd like your workshop to run.
 - If you are applying for a summer workshop (Format #1 or #2), please give at least TWO specific options (feel free to label them "first choice," "second choice," etc.) for the dates your workshop might run in summer 2024, between May 20 and August 6 (to avoid the days of MAA MathFest, August 7 - 10). We will need to know the firm dates by December 15, 2023, but for now please give us your best guess.
 - If you are applying for a Learning Community to take place in either Fall 2024 or Spring 2025, please give your best guess for a schedule (meeting days/times) to confirm that you are thinking about this. We do not need to pin this down precisely until roughly 3 months before the workshop starts.
- How will your team of facilitators model research-based teaching and learning in conducting the workshop? What core activities will you include as part of the workshop? Don't worry now about how to fit into the schedule, but do itemize the main activities in asynchronous or synchronous modes. We will post some more detailed examples of workshop outlines on this page before the end of September.
- What deliverables will be expected from each participant? e.g. learning objectives, syllabi, course materials, problem sequences, assessments, projects, reflections, program plans.... We will post some more detailed examples of workshop outlines on this page before the end of September.

Community and Inclusion

A key component of the workshop includes some synchronous follow up activities, perhaps in separate smaller groups. In addition, you will have access to a special Google Group email list and Google folder space for your workshop participants, so part of the followup plan could be a strategy for keeping the conversation going among participants.

- What will you do to build a sense of community among participants during the workshop?
- What will you do to support participants after the workshop in implementing new practices and plans?

Another important component of all OPEN Math workshops is attention to issues of equity and inclusion, both as intentional parts of the online workshop design and as goals for the participants teaching their own courses.

- What will you do to help participants make their own classroom or program work equitable and inclusive?
- What will you do to model equitable and inclusive practice in conducting the workshop?

Personnel and Budget

Please tell us a bit about your team of (prospective) workshop leaders, including their expertise, prior PD experience (face-to-face or online), and constituencies/networks/stakeholder groups they belong to. We encourage you to consider constructing your team with the broadest possible representation and involving at least one emerging professional development leader, thereby expanding the community of practice around professional development leadership.

Please provide an estimated budget of up to \$12,000. This may include stipends for leaders and presenters as well as any materials, software, or license fees associated with delivering the workshop. There must be at least 3 facilitators/leaders/presenters listed, and the maximum stipend for any individual is \$4000.

1.2 Request to Repeat a Program

Programs that have a high demand and receive strong evaluations may be repeated once upon approval of the OPEN MATH leadership team. Except for unforeseen, extraordinary circumstances, we will not support the same workshop team for three summers in a row. An important goal of the MAA OPEN Math project is to broaden and support the community of providers of teaching-focused professional development, so we will strive to have a mixture of repeating teams and new teams. Hence, there is no guarantee that all who wish to repeat their workshop will be able to do so. Any request to repeat should focus on the following three areas:

- **Lessons learned** – In response to program evaluations and the organizers' observations, describe what will be done differently. Describe what worked and what didn't work. Describe what will be retained and what will be changed.
- **Follow-up activities** – Describe the follow-up activities that took place after the previous program.
- **Impact on participants** – Describe how participants have used what they learned in the program. Describe changes they have made in their classrooms as a result of participating in the program. Describe presentations participants have made at local or national meetings

1.3 Selection Committee Rubric

Each rubric item is scored on a scale of 1 to 5. In each section there is space for comments. In the case of an uncommon score (high or low, by your own standards) to a rubric item, please add a comment or two that explains more about that deviation.

Title, description, and intended audience

Rubric item 1: Is this a good online, summer workshop topic for the audience indicated?

Rubric item 2: Is the indicated audience robust enough (to fill a workshop) within the mathematics community in general, and within the targeted groups (instructors for whom accessing traditional PD is a challenge)?

Workshop Content: Learning objectives related to active-learning pedagogy

Rubric item 3: Is the workshop appropriately focused on some active-learning pedagogy?

Rubric item 4: Are the learning objectives measurable and articulated clearly?

Workshop Activities

Rubric item 5: Does the team have experience with, or realistic plans for, workshop activities that model active teaching and learning in their delivery of this online workshop?

Rubric item 6: Is the list of “deliverables” realistic and likely to make an impact on the participant’s teaching?

Community and Inclusion

Rubric item 7: Does the team have realistic plans for followup activities that will continue building a sense of community among participants and support participants’ implementation of new knowledge in their own classrooms?

Rubric item 8: Does the team have experience with, or realistic plans for, workshop activities that model equitable and inclusive practices within their delivery of this online workshop?

Rubric item 9: Does the team have experience with, or realistic plans for, teaching participants to apply inclusive and equitable practices in their course design and classroom practices?

Personnel and Budget

Rubric item 10: Is the facilitation team adequate (in size, in expertise, in diversity, in experience, ...) for meeting the workshop and project goals?

1.4 Winter Planning Meetings

In three online meetings over the course of one month, experienced providers of teaching-focused professional development will lead conversations among the OPEN Math workshop facilitators for the subsequent summer. See [Appendix A](#) for a tentative outline of these planning meetings.

2. Strategies for Online Professional Development

Table 1 in the [AIBL Handbook](#) summarizes four key elements of facilitation identified from participant and facilitator data and the strategies that AIBL facilitators described. The elements can be thought of as goals or aspirations, and the strategies as ways to achieve these goals. The handbook goes into greater detail about particular tactics and tools.

2.1 Key Elements/Strategies of Workshop Facilitation

Key elements of workshop facilitation	foster interaction & build community	be ready: organize & plan ahead	model active learning & teaching	infuse equity & inclusion
<i>Strategies for enacting these elements</i>	Set norms Structure ways to interact Build group-worthy tasks Connect with learners as humans	Prepare tools & platforms Curate useful resources Stick to breaks & schedules Gather & respond to feedback	Use evidence-based practices to teach about evidenced-based teaching Offer principles & frameworks Model & point to tactics Recognize that contexts differ	Attend to equity within PD and back in class Use teachable moments Model & point to tactics Don't ignore the tricky stuff
<i>Challenges when moving a workshop online</i>	Mixing & connecting occur less naturally	Time zones! Zoom butt! It's harder to adapt on the fly	Must model <i>online</i> teaching even when the workshop goals are different	New equity issues arise for instructors & students
<i>Adaptations needed for online facilitation</i>	Structure interactions with intent Offer multiple ways for people to connect	Prepare in detail Assign tech backup duties Recognize affordances of technologies	Narrow learning objectives Move some activities to asynchronous formats	Recognize variety in tech resources & comfort Address needs to hear, see, & participate

2.2 Getting Feedback as You Go: Formative Assessment Ideas

We encourage you to include formative assessment in your daily plans, to probe participants' thinking and to get some feedback from them along the way about how things are going. Here are a few we like. As a bonus, these tactics also model useful strategies for formative assessment or metacognition that people can use in their own classes. Formative assessment helps participants (or students) be metacognitive: it's beneficial for learning to reflect -- what am I thinking, and how has my thinking evolved? And it's useful for you to get their input on what they need more of (and what they don't!), and so to adjust your strategies or timing.

Waterfall, or 1-2-3 Go

This is a Zoom-friendly way to efficiently share a lot of ideas about a single prompt. We have seen this used very effectively in workshops, to brainstorm or to check in on how people are receiving or struggling with an idea. To run a waterfall, post a prompt to the Zoom chat window and ask people to type an answer, but not hit Submit until you say 1-2-3-Go (see also Robin Wilson's writeup in the AIBL Handbook). Responses flood into the chat window, and everyone takes time to read them.

This works best with a simple prompt that can have many right answers, such as "Share one idea for doing X in your class," or "What is one challenge you face in implementing Y in your setting?" This one is not anonymous in Zoom. You can read through the answers individually, or turn it into a discussion by inviting people to share (ask for volunteers or pick answers that intrigue you). Capture the chat so you can share the ideas to everyone.

Minute paper

This is a classic formative assessment for seeing what is clear or muddy about key ideas. This one can be anonymous. One way to implement it online is to set up Google Slides where each slide has the prompt and 6 answer boxes (3 rows, 2 columns). Prepare as many copies of the slide as you need for everyone to have a box. Everyone chooses a box and starts to write. When time is up, everyone takes time to read the responses - it's quick because they are compact.

This format is well suited to a reflective question where you want to capture a range of ideas, such as "What do you think of when we say X?" or "What discomforts did the homework task generate for you?" The small box makes it clear what grain size of answer is expected. People can add their initials or write anonymously; leaders can scan a lot of answers quickly and choose a couple to comment on or invite discussion. (Thanks to Naneh Apkarian, Estrella Johnson, and Sara Rezvi for the online version of this tactic.)

Gots and needs

Everyone writes at least one sticky note with something they "got" today, and at least one with something they still "need." The "gots" help you know if your learning objectives for the day were achieved. The Needs help you identify topics to visit or revisit tomorrow.

This works well as a daily exit ticket, where everyone reflects a bit at the end of the day. Grouping the Gots and Needs into themes, and planning how to respond, is a good exercise for the end-of-day team meeting. For the most candid feedback, do it on a jamboard or padlet, where people can be anonymous. When you respond to issues the next day, call attention to the changes you made, so they know you heard and are responding to the feedback: “Several people asked for X in their Needs yesterday, so we’re going to [take next step].”

Roses, buds and thorns

Because this is a bit more work, it’s less suited to daily feedback, but good for a midway checkpoint or end-of-workshop reflection. You can invite people to share in small groups or in the whole group. It’s nice to read the three responses together from each individual, but a padlet of 3 columns could also work here.

Rose = A highlight, success, small win, or something positive that happened.

Thorn = A challenge you experienced; something you can use more support with.

Bud = New idea that has blossomed; something you are looking forward to learning more about or experiencing.

Daily team debrief

We highly recommend this practice, even if it’s quick, to go over the plan for the next meeting, make any adjustments based on Gots and Needs, and review who is doing what when. Maybe you’d like to share your own Gots and Needs at this time. It can be very helpful to have team members rotate through an observing role, who can then comment on what they noticed during a particular session. It’s a good time to appreciate each others’ different contributions and roles!

2.3 Follow-up Support

Keep the conversation going

We know from research that workshops are more impactful on practice if they are not just one-and-done. That is, if participants experience meaningful support to implement what they have learned, they are more likely to do so, and to have enough success that it encourages them to continue implementing and developing their skill at the new teaching methods they’ve learned. And, after a successful workshop, people feel connected and will want to keep talking about your shared teaching interests.

Some workshops have already thought of mechanisms to get everyone together again and support each other in implementation. That is great! If you have not thought about that yet, or to complement your current plans, we encourage you to explore with your participants how they might like to stay in touch - via an email list, Slack or Discord channel, MAA Connect group, or some other means. This doesn’t mean you have to run that yourself (though you may like to). Consider asking a couple of friendly and outgoing participants to take on the task of prompting

everyone from time to time, to keep a supportive community going. Keep reading for ideas about how to do that!

Tactics to keep the conversation going

From previous work tracking this kind of post-workshop support, we know some things that work well. Chuck Hayward used social network analysis to analyze the communication functions of a post-workshop email list and found that its main function was building community: nearly half of all messages sent had a social function such as celebrating student successes or commiserating about challenges. These behaviors made it safe to share difficulties and thus the list became a supportive problem-solving space. While persistent prompting from the workshop leaders was required to get this culture going, eventually participants took over and initiated new conversations of their own. Posts that shared information alone were sometimes helpful but rarely started conversations; rather, lively conversations occurred especially when people shared a problem and others helped them think of solutions (“When that happened to me, here’s what I did....”). Chuck distilled his findings into these pieces of advice:

Build community, persistently, through inviting participation and offering emotional support. (Acknowledge that what participants are doing is challenging. Thank people when they contribute.)

Let things simmer to encourage participant responses. But don’t let posts go unanswered. This transfers authority to the group.

Relevant prompting helps (e.g., share teaching plans in August; check in and consider gathering student mid-course feedback in October; debrief and reflect in December).

Keep a low floor for participation. (“what are you doing?” is easier to answer than “how did it go?”; check in with individuals who haven’t posted and ask them to share experiences to the group)

Workshop leaders have been the people to initiate the followup support in the past, but this need not be the case. With a little knowledge about “what works,” a couple of participants could take on the role of “listserv mavens” or “Slack captains” and work together to keep the group communicating. Chuck gave a conference talk in 2017 that explains and elaborates on these findings; if you try this approach, we suggest that you and your captains watch the video and plan some tactics (20 min. video). For a deeper dive, and more of the intriguing social network visuals, take a look at Chuck’s paper.

3. Workshop Evaluation

This section on evaluation is presented in the form of FAQs compiled through the fall of 2023. The original document is [here](#), as prepared by Sandra Laursen, Kyra Gallion & Tim Archie of the Ethnography & Evaluation Research at the University of Colorado Boulder.

3.1 What is the Evaluators' Role?

The evaluation is designed to gather formative feedback to help shape and improve PD offerings in the future, and summative information about what the project accomplished and what difference it made. Formative evaluation is like tasting the soup to see if it needs more cayenne, and summative evaluation is like asking your friends how they enjoyed their meal.

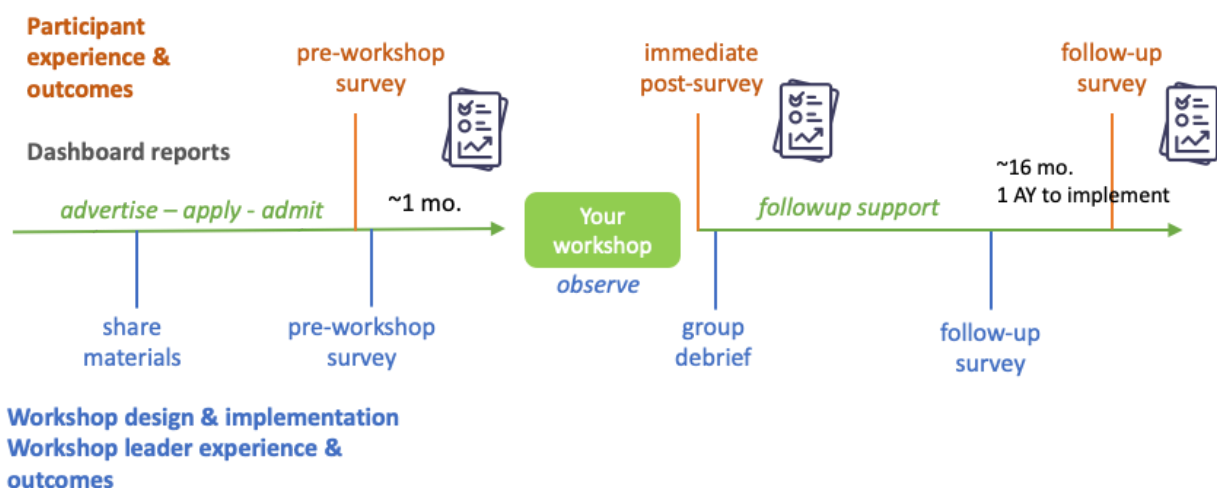
We gather data to track what participants experience, what they learn (or not), and how they do or don't implement what you share, and to capture what you learn (or not) as professional developers. We'll also use these data to provide feedback to improve future PD offerings. Taking a broader lens, we'll use what we learn to develop research findings and recommendations about effective practice in online PD.

We take our professional responsibility very seriously to interact ethically with everyone who is part of the project, and to protect the privacy and confidentiality of information that you and they share with us. All components of the evaluation have been approved by the University of Colorado Boulder's Institutional Review Board (IRB). We are happy to answer questions or respond to any concerns.

[Our group](#) has worked a lot on professional development in STEM disciplines, and we like supporting teachers to improve learning and experiences for students.

3.2 What is the Evaluation Design for OPEN Math?

The evaluation focuses on tracking growth for participants, tracking growth for workshop leaders, and capturing effective practices for running online workshops for college instructors. The graphic provides a snapshot of the evaluation components and timeline, and the text provides a bit more detail about each component.



Participant experiences, learning, and outcomes

This part of the evaluation focuses on what participants take away and use from the workshop. We also ask about their experiences, in order to provide feedback on what works and how it can be improved.

We use a series of 3 surveys, given shortly before the workshop, immediately after the workshop, and longer after the workshop, in the fall a full academic year after they attended. Details about each are summarized in the chart below.

Participant survey	Purpose & content	How & when Feedback you get from us
Pre-WS	Baseline Initial knowledge, skills, attitudes related to the workshop topic <ul style="list-style-type: none"> • general OPEN Math goals • your team's learning objectives Self-described teaching practices Professional background, work context, & personal demographics	Email from eval team ~4 weeks < WS Eval team will share responses prior to your WS, to help you become familiar with your folks & their needs.
Immediate post WS	Learning Workshop experience Knowledge, skills, attitudes related to the workshop topic <ul style="list-style-type: none"> • general OPEN Math goals • your team's learning objectives Implementation plans	Last half hour of WS (save us time, please!) Eval team will share a summary of responses & pre/post comparison
Followup	Implementation Knowledge, skills, attitudes related to the workshop topic <ul style="list-style-type: none"> • general OPEN Math goals • your team's learning objectives Implementation actions Context for implementation	Email from eval team Late fall 15-16 mos > WS Eval team will share a summary of responses & pre/post/followup comparison

If you have specific survey questions that you've used before and want to use again, or other specific needs for evaluation, let us know. We will get the best responses if we coordinate efforts.

Workshop leader experiences, learning, & outcomes

This part of the evaluation focuses on what you, as workshop leaders, take away and use from leading a workshop. We also want to know about your experiences, in order to provide feedback on what works and how it can be improved.

We use a series of up to 3 surveys, given shortly before the workshop, immediately after the workshop, and near the end of the academic year after the workshop. Details about each are summarized in the chart below.

Leader survey	Purpose & content	How & when
Pre-WS	Baseline Initial knowledge, skills, attitudes about professional development (PD) Professional background, work context, & personal demographics	Sent by email a few weeks < WS
Immediate post WS	Workshop implementation & leader learning Workshop experience Knowledge, skills, attitudes about PD Implementation plans Advice to the project	Sent by email soon after WS
Followup	Leader capacity & community Knowledge, skills, attitudes about PD Connections to other PD providers	Sent by email spring term > WS

Workshop implementation

To understand participant responses to the workshop, and to learn more about effective practices for online PD, we want to know what happens in the workshops. In addition to your and participants' perceptions from survey responses, several approaches help us understand your workshop goals and design.

- Access to workshop materials. We want to understand your plans and to see the same workshop-ready materials as your participants do. We'll need access to your WS hub, and please include us in your communications with participants (e.g. group email list or whatever you use). We'll ask for a few key documents in advance, including your schedule and workshop learning goals.
- Pre-workshop group conversation about your learning objectives and key workshop features. We need this info to prepare the pre-workshop survey. We'll be in touch to schedule this with each WS team. See 3.1 below for more about learning objectives.

- Workshop observation. This is our best way to understand the participant experience, interpret their comments, and follow how WS plans work out in real time.
 - We will try to observe in real time as much as possible - that's most efficient for us - but ask you to record Zoom sessions as a backup, since it's a busy summer for us with 7 workshops going on. We will not use the recordings for other purposes.
 - The Zoom recordings that help us may also be helpful to registered participants who miss a session (nearly inevitable) or who want to review a session. They are intended for personal use only; please make sure people understand this ("[Vegas rules](#)"). In particular, they are not a substitute for attending: recordings should not be available to people who registered for the workshop but did not attend, or to people who did not register. For this reason, please post links to Zoom recordings privately, with password protection, rather than publicly. The recordings can also be used by your workshop team for self-evaluation (e.g., to debrief or review) but not as a research data source. Our IRB permissions and consents do not include research use of workshop recordings as a data source.
 - The focus of observation is the workshop design and implementation, NOT what any individuals do or say. We do not track any individuals in the observations or link observations to individual data.
 - Perhaps the trickiest part of recording workshop sessions is remembering to start and stop the recording. If you stop it for a break or quiet time, please set a timer or other reminder to re-start it. If you leave it on, remember that casual conversation is recorded too.
- Post-workshop group debrief, soon after the workshop is over, to capture your immediate thoughts about how it went.
 - It works well to do this right after the session ends, or as participants are finishing their post-workshop survey (e.g., if the team pops off to its own breakout group) -- but we know that may not work for every group. We'll schedule this with you prior to your workshop.

3.3 What do the Evaluators Need from Workshop Teams?

Your help and good will are essential to support the evaluation - both to encourage participants to complete the surveys, and to participate yourselves. We want to learn from you and we are happy to be helpful whenever we can.

Learning objectives

We will need a list of 4-6 learning objectives for your workshop - what participants will be able to do after they have completed your workshop. The objectives need to be clear and measurable, stated in terms of active verbs. We will use these to develop survey items that are specific to your workshop, along with a set of general items for all the OPEN Math workshops.

Some links that may be helpful for writing learning objectives:

Step by step guide, [how to write learning objectives](#). From Robert Talbert, a math educator at Grand Valley State who thinks a lot about learning and teaching.

How to [articulate your learning objectives](#), and how these relate to workshop activities and tasks (“assessments” in a course, here you can think of it as work that participants will generate in your workshop). From Carnegie Mellon’s Center for Teaching and Learning (CTL).

A guide to [using Bloom’s taxonomy to write learning objectives](#), with a good list of verbs. From U. Iowa’s CTL.

A sketch of [Dee Fink’s categories of significant learning](#) - an expansion of Bloom’s taxonomy that goes beyond cognitive kinds of learning. The links have more good verbs! From U. Buffalo’s CTL.

Communicating with participants

We do our best to keep the communication role off you, but here is a short checklist of ways we hope you can help us communicate with participants

- If you have a pre-workshop introduction process, we’d like to introduce ourselves too (e.g. on Google Slides as for the winter workshop sessions). It helps when we can explain to them our purpose in participating. Please add us to your group email list or whatever you are using to communicate.
- Communicate positively or neutrally about the evaluation. If folks have questions about evaluation that you can’t answer, please do send questions our way.
- It is very helpful if you can set aside time for Jenny (or her observing partner) to introduce herself early on the first day, to explain her presence in the workshop and set people at ease about her taking part.
- Please save us some time (25-30 min., ideally) at the end of the last session, so we can have people fill out the post-survey in real time. This raises response rates enormously and thus provides more accurate and more general feedback to you.
- We may ask you to remind participants about surveys if we need help raising response rates for the followup survey, in particular.

4. The Role of MAA Staff

The OPEN Math Leadership Team performs an oversight function for the overall program through activities including soliciting proposals, selecting the annual slate of programs, leading the annual workshop Planning sessions, and executing evaluation activities. The OPEN Math Leadership Team coordinates with MAA staff to establish proposal guidelines and evaluation criteria and to develop materials needed for the MAA communication plan. MAA staff is responsible for advertising the programs, soliciting and processing applications, collecting registration fees, providing technical support and advice as needed, reimbursing expenses, maintaining records, writing reports, and communicating with committees, workshop directors, potential program leaders and participants.

4.1 Finding your Workshop Participants

Toward the end of January, all MAA marketing for your workshop (including descriptions, bios, and headshots) will be pulled together from documents that you submitted (and have had an opportunity to edit) into an accessible **master document** on Google drive. If you need to update anything after we have built this document, please edit the **master document** and tag programs@maa.org in a comment.. Alternatively, you can email programs@maa.org to give staff a heads up on what has changed. *We do not want to change the advertised workshop dates/times once we start advertising, but everything else is fair game.*

The MAA announces workshops in MAA publications, emails, and social media, as well as in networks of other professional societies as appropriate. In particular, the dates and names of workshops will appear in a spring issue of MAA FOCUS, and more detailed information will be shared through more expeditious channels within two months of the registration closing date. The MAA maintains a website with descriptions of all selected workshops and other general OPEN Math program events. In addition, OPEN Math is advertised through MAA Connect and other networks as appropriate. The following will be requested from workshop leaders to ensure thorough marketing of the event:

- Short (≤ 3 sentences) bios for presenters, headshots for presenters, presenters' social media handles
- Mailing addresses for speaker kits, if relevant
- Workshop title
- Two versions of workshop description: 200 words to include when we use the description as one of a scrolling list and 400 words for the dedicated registration page, where your workshop appears on its own
- Suggestions for which groups (within or outside of MAA) to target for advertising. Note that we will ask for your team's help with reaching into your own circles that are outside of MAA

MAA Templates & Branding

In a shared Google folder, you will find presentation templates (Google Slides, MS PowerPoint, and Beamer versions), a Zoom background, and virtual speaker tips. Please use these templates when preparing for your workshop, as much as possible. Additionally, there is a Branding Guide for MAA OPEN Math available in that same Google folder. Please review this and apply these guidelines as you finalize your workshop materials. Please especially note the funding acknowledgment. We've also included MAA's social media handles - please tag us! While not every detail needs to reflect these templates and guidelines, we would like for your workshop to be clearly recognizable as an official MAA offering.

Speaker Kits

For those of you who have participated in OPEN Math or MAA Virtual Programming previously, you're likely familiar with the free-to-you speaker kit that is provided. This kit includes a headset and ring light in order to help you have the best presentation experience possible. If you will be an onscreen speaker or facilitator and have not received an MAA Speaker Kit before, please request this kit at least 3 weeks prior to your first workshop session by completing [this Google Form](#).

4.2 Supporting Communication with Participants

Google Group

MAA staff will build a registration page for your workshop on their event management platform. Registration has been configured to let participants know that their contact information would be shared with the workshop organizers. This is done to 'cut out the middleman' so that MAA staff do not need to field all correspondence between participants and organizers.

Around the end of April, MAA staff will send you a list of your registrants, including all of their answers to registration questions. Please note that this list is subject to change as registrants cancel their registration and waitlisted participants are added, but we have found that the initial list is at least 90% correct, so we encourage you to use it early to start building a sense of community among your workshop participants.

Closer to the start of your workshop (approximately one month before your workshop is scheduled to begin), MAA staff will create a Google Group that you can use to email your participants. This group will also include relevant MAA staff and OPEN Math leadership personnel. Once it exists, please use this Google Group for all email communications. It has the feature that late arrivals can see all previous messages by logging into <http://groups.google.com>, and it allows participants to decide individual email preferences such as direct email or daily digests of any discussions.

Google Group Maintenance

Please designate one person on your team who will be assigned admin privileges for the Group. Inevitably people (participants and/or facilitators) will need to change their email address in the group, so someone on your team should have the power to do this quickly when issues arise. The Google Group will remain active for (approximately) the academic year subsequent to your workshop in order to encourage post-workshop collaboration and communication. We typically deactivate one year's Google Group around the time we build out the next year's groups, but we can be flexible if you let programs@maa.org know you have a need for it to persist longer.

Google Drive

Each workshop will have a designated folder in the Shared Google Drive for OPEN Math. This folder will be shared with workshop leaders on or about May 1 and then with participants before the workshop (around the time your Google Group is created). Please use this folder for all shared materials for your workshop. If you'd like to use another platform (Padlet, Canvas, etc.), please include the link to that platform in the Google Doc "Links and Online Resources" that will already be in the folder. This is so the evaluation team and MAA Staff (if needed) can access the materials as well.

Certificate of Participation

Following the workshop, MAA staff will ask you to verify the attendance of your registrants and MAA staff will send certificates of participation to those who participated at an adequate level in the workshop. It will be entirely up to the workshop leaders which participants receive certificates.

Workshop Zoom Support

The leadership team of each workshop will be given access to an OPEN Math Zoom account. These accounts are shared with other workshop leaders that will be using them during other parts of the summer, so please refrain from using them outside of your scheduled workshop hours (with an hour on either end for prep and debrief). All OPEN Math workshops will be hosted on the MAA's Zoom license as Meetings (as opposed to Webinars) to allow for the use of breakout rooms and other features. MAA Staff will share this Zoom account schedule with all workshop leaders closer to the start of the first workshop, so you can see exactly who else is using the same Zoom account and when.

Once you have the login information, you'll be able to set up polls, and configure other settings as needed for your workshop. Please name your polls in such a way that it is clear which workshop they belong to. After your last workshop session, if you have changed any standard Zoom setting, please change them back for the next team.

Pre-Event Meeting with MAA Staff

All workshops will have a meeting with MAA Staff at least one week prior to the first session of their event. This time is for your team and MAA staff to work out any logistical details prior to

your event. We can test aspects of your presentation(s), or you can use that time to rehearse part of your presentation(s).

MAA Staff On-Call

One member of MAA Staff will be 'on call' during all of your workshop sessions for any technical difficulties, logistical assistance, etc. This person will not be present in the meeting unless called upon. During your Pre-Event Meeting with MAA Staff you will be given the contact information of the MAA staff member who is "on call" during your workshop.

4.3 Process Applications to Attend Programs

The MAA solicits and processes applications to attend the several summer workshops available for post-secondary instructors. Participants for a workshop are typically selected on a first-come, first-served basis, with college and university instructors being given priority. However, in rare cases a workshop director may opt to accept participants based on criteria that are clearly stated in the abstract for the workshop. In this case, the workshop director will work closely with MAA staff to set up an application process (such as with a google form) through which the workshop director can determine acceptances following pre-arranged and announced procedures. The workshop director will need to communicate to MAA staff the need for this additional step before the registration forms are built out.

MAA staff will maintain a waitlist for workshops and fill in participants from the waitlists as space opens up from cancellations. The MAA staff will have complete discretion in weighing the benefits of filling seats against the resources required to do so. For example, the closer we get to the workshop start date, the less likely it is we can fill a vacated seat from the waitlist.

4.4 Cancellation of a Program

It is expected that a typical OPEN Math workshop will have approximately 25 participants. Programs that have fewer than 15 registrants at the close of registration may be canceled by either the MAA or the workshop director. The MAA will only reimburse expenses and pay stipends if the program is held.

4.5 Participant Registration Fees

Participants remit a registration fee to the MAA prior to their participation in a workshop. This fee is used to defray costs of the OPEN Math project, furthering the goal of an ultimately self-sustaining project. Note that there are financial incentives offered for workshop participants to complete evaluation surveys, which in effect reduce the real out-of-pocket expense of attendance. If a workshop director is approached by potential participants with financial hardship, they may forward that person's information to programs@maa.org, and the project leadership will consider requests for reduced or waived fees.

4.6 Support Evaluation Activities

The collaborating partner in the OPEN Math project is the Evaluation & Ethnography Research group at the University of Colorado Boulder, led by Sandra Laursen and Tim Archie.

The MAA staff supports the evaluation activities by including evaluators on any relevant communication with participants, sharing registration information, and updating the webpage as requested.

5. The Role of a Workshop Director

The OPEN Math team and MAA staff facilitate and support the activities of the directors for each workshop. However, the authority and responsibility for designing and conducting a professional enhancement program rests with the workshop director. First and foremost, workshop directors are expected to offer a high-quality program for the participants. In the process, directors are expected to adhere to the rules regarding the use of federal funds and to acknowledge the contributions of MAA OPEN Math and NSF in their workshop via some statement of this form:

OPEN Math is a collaborative project between the Mathematical Association of America (MAA) and the University of Colorado, Boulder (CU-B). Support for OPEN Math is provided by the National Science Foundation: MAA Award DUE-2111260 and CU-B Award DUE-2111273.

Directors are expected to work with MAA staff to ensure technologies are sufficient, communicate with participants, promote the evaluation process for participants, and directly participate in the E&ER evaluation process.

5.1 Offer a High-Quality, Sustained Faculty Development Experience

The success of the OPEN Math project depends on experienced leaders who offer online, high-quality faculty development workshops to mathematical sciences faculty. These workshops must conform to the description in its abstract and conform to the expectations listed in Section 1 of this handbook. In particular, each workshop is expected to provide a sustained professional development experience with the following components:

- Focus on instructional practices
- Focus on inclusion, equity, diversity, and justice
- Measurable learning outcomes for participants
- Active engagement of participants
- On-going or follow-up component

Winter Planning Meetings

The workshop director should delegate at least two facilitators (possibly themselves) to attend the winter planning meetings around February. During these meetings new workshop leaders and returning workshop leaders will collaborate on strategies for their workshops and follow-up activities. Both groups stand to gain a lot from this collaboration, and these meetings are the

primary mechanism for the transfer of knowledge on best practices and for nurturing the community of providers of teaching-focused professional development.

5.2 Communicate with the MAA

Workshop directors are expected to stay in close touch with the MAA staff and OPEN Math personnel. For example, to assist the MAA in advertising the OPEN Math program, each workshop director is responsible for providing the following information in a timely manner from when it is requested.

- A description of the program that can be used in advertising. This should include a clear description of any special prerequisites (such as previous Planning, skills, or experience) that participants must fulfill before the MAA can register them to take part in the workshop.
- Verification that the dates listed by the MAA for the program are correct. ·An updated, detailed agenda for the program, including descriptions for any preliminary or on-going components that will take place outside of the intensive period of the program.
- Names and short biographical sketches for all program leaders and speakers, as well as copies of agreements that have been reached with them regarding their payment and reimbursement of expenses. These agreements may be in the form of an email, or they may be more formal.
- Verification of budget information so that all workshop expenses will be paid in a timely manner.

5.3 Communicate with Participants

Once the participants have been selected, the workshop director is responsible for reaching out to provide them with additional program information and beginning the process of building a sense of community. A draft letter is available from the MAA upon request.

The workshop director is responsible for communicating details about assignments that must be completed during the preparatory component of the program. Participants appreciate receiving a clear statement of expectations and/or a program agenda prior to the start of the program. Any workshop director who does not use the assigned Google group for communication should cc programs@maa.org on all email, so the OPEN Math project staff are aware of all communication. (This happens automatically if the assigned Google group email is used.)

5.4 Promote your Program

Workshop personnel are expected to participate in the promotion of their own programs by communicating to appropriate audiences within their own professional circles. The following will be requested from workshop leaders to ensure thorough marketing of the event:

- Short (≤ 3 sentences) bios for presenters, headshots for presenters, presenters' social media handles
- Mailing addresses for speaker kits, if relevant
- Workshop title

- Two versions of workshop description: 200 words to include when we use the description as one of a scrolling list and 400 words for the dedicated registration page, where your workshop appears on its own
- Suggestions for which groups (within or outside of MAA) to target for advertising. Note that we will ask for your team's help with reaching into your own circles that are outside of MAA

All OPEN Math Workshops will be included on MAA Connect's homepage's Events section. We encourage each leadership team to post about their workshop to any communities they may be a part of. For any communities that you may not have access to, please reach out to programs@maa.org so that we can post to that group on your behalf. To avoid oversaturating MAA Connect, please be mindful of posting about your workshop only in communities whose focus is relevant to your content.

Encourage Evaluation Activities

Organizers should encourage participants to complete the evaluation surveys at the beginning and end of the intensive component as well as the followup surveys sent later.

Appendices

Appendix A: Outline for the Winter Planning Meetings

The following outline for the sessions is tentative (i.e., it is subject to review by the leadership team each year) but conveys the essential structure of these meetings:

Session 1 (2023)

1. What to expect in session 1
 - a. Intro to the MAA IP Guide.
 - b. Plan to provide vicarious experience to workshop participants.
 - c. Identify key obstacles your participants face.
 - d. Identify the pedagogical core of your workshop and revisit your workshop's learning goals.
 - e. Plan to address the obstacles using a strand model.
 - f. Opportunities for us to listen and hear from each other and identify needs, directions.
 2. Session 1 Resources
 - a. [Resources for Professional Developers](#) on the Academy of Inquiry Based Learning.
 - b. AIBL Handbook tinyurl.com/AIBLhandbook.
 - c. MAA IP Guide
 - d. As you think about your workshop schedule, we have a document [PD Practices: What consistently works and what doesn't](#), by Kyra Gallion. Long breaks, not trying to cover everything, etc. are good ideas to think about as you work on your schedule.
 - e. Important dates and timeline
-

What you need to do before Session 2

1. **Watch** this video by Elizabeth Thoren, Pepperdine University, *Guiding Principles Informing Responses to the Challenges of Virtual Multi-Day PD*. Includes discussion of the 3-week workshop model.
 - a. Video here: [Talk \(15 min\)](#) with
 - b. [Slides](#) if you want to follow along.
 2. **Prepare** for the equity session work by **discussing** with your team.
 3. **Read** the document about nuts and bolts.
-

Session 2 (2023)

1. Equity session links
 - a. Slides
 - b. Equity session padlet
 - c. Share your resources!
 - d. Revisit your workshop's learning goals and update them
2. What to expect from session 2
 - a. Thinking about the equity layers.
 - b. Discussions about *equity at your workshop (E2)*, *equity in your participants' teaching (E1)*, a focus on equity in recruiting (E3).
 - c. Nuts and bolts discussions to get the tech right for your workshop (T2) and to help participants of your workshop with the nuts and bolts of teaching their classes (T1)
3. Nuts & Bolts Session
 - a. Slides
 - b. Nuts & Bolts to Prep Participants to implement active learning in differential equations inspired by modeling
 - c. Nuts and Bolts Resources
 - i. PD Practices: What consistently works and what doesn't
 - ii. Nuts and Bolts: Holding together a successful online workshop
4. Session 2 Equity and Inclusion Resources
 - a. [Sample Module for running an equity focused session at your workshop](#)
 - b. *Structure Matters: Twenty-One Teaching Strategies to Promote Student Engagement and Cultivate Classroom Equity*, Kimberly Tanner [Link](#)
 - c. *Advancing Inclusion and Anti-Racism in the College Classroom* [Link](#)
 - d. Theobald, et al (2020) *Active learning narrows achievement gaps for underrepresented students in undergraduate science, technology, engineering, and math* [Link](#)
 - e. Freeman et al (2014) *Active learning increases student performance in science, engineering, and mathematics* [Link](#)
 - f. [Academy of Inquiry Based Learning Equity and Inclusion Resources Page](#)
 - g. *Advancing Equity in Climates of Resistance*, Luke Wood, San Diego State University <https://www.youtube.com/watch?v=Eysa0JvBanY>
 - h. [Step One Self-Paced Workshop on Race in America](#)
 - i. [Learning about our relationship to Native Peoples. self-paced workshop](#)
 - j. Blog post by Dr. Mirjam S. Glessmer, on some vignettes on dealing with microaggressions. [Link](#)
 - k. [CMBS Statement on Diversity. Inclusion](#)
 - l. AIBL Handbook, [tinyURL.com/AIBLhandbook](https://tinyurl.com/AIBLhandbook) - element 4 in particular, on infusing diversity, equity and inclusion within a workshop

- m. MAA IP Guide - in particular the manifesto, for language about how this fits, and other sections such as DP.1.3, designing for equity, and section XE, equity in practice, in the cross-cutting themes. You will find other tidbits throughout the guide.
- n. (E3 Recruiting & Equity) MAA Guide to recruiting and advertising your workshop.

What you need to do before Session 3

1. **Make** or **Revise** your annotated workshop schedule. It might help to **Read** these examples.
 - a. [Example One](#) (OPEN Math 2022)
 - b. [Example Two](#) (OPEN Math 2023)

Share your draft schedule.
2. (Optional if needed) In preparation for our discussion of attending to student buy-in, **Read** [this blog post](#). The blog post is focused on IBL, but the main ideas transfer to other contexts.

Session 3 (2023)

1. Annotated Schedules: Alignment and coherence & Details
 - o [The rubric for looking at annotated schedules](#)
 - o [Dee Fink's workbook on backward course design](#)
2. Student buy-in, attending to the student experience. Resources:
 - o Student Buy-In In Practice Overview. A blog post focused on IBL, but the main ideas transfer to other contexts.
 - o How do I help students engage productively in active learning classrooms?
3. Follow-up support: Each team should plan for follow-up support.
 - o **Option 1** is to host 2 meetings in fall and 2 meetings in the spring. These do not have to be heavily planned and can be ways for people to share, bring back some student work, how things are going. Suggested time range is 1-2 hours.
 - o **Option 2** is a structured email mentoring program without follow-up meetings.
 - o [Link](#) to what email mentoring can be like on the IBL Blog.
4. ["You're Peculiar"](#) slides to help your participants develop a better understanding that they might be very different from their students, and that saying, "It worked for me..." is both true and not the way to extrapolate teaching decisions. The focus should instead be on their students.
5. Additional resource - the AIBL Handbook for Online Professional Development has a good section under element 2, being ready with logistics (organization and planning).

Lots of tested strategies from fellow professional developers!

tinyURL.com/AIBLhandbook

Closing and after session 3

1. *Logistics heads up* There will be a “Tech Check” about a week before your workshop with MAA, to walk through the technology and make sure everything works. MAA will contact you with possible times.
2. **Meeting with your OmBud in May.**
 - a. We will reach out to you to schedule a meeting in May.
 - b. Go over your plans, schedule, learning goals, tech, anything else.
 - c. Please contact us if you have questions or want to run something by us.

Appendix B: Reimbursement of Expenses


Since OPEN Math is funded by a grant from the National Science Foundation, the MAA is responsible for adhering to certain laws and regulations governing the use of these federal funds and must ensure that those receiving these funds are also in compliance. Workshop directors are responsible for implementing all aspects of their proposed programs in accordance with all applicable provisions of the administrative requirements and cost principles in 2 CFR 215, 2 CFR 220, 2 CFR 230, and NSF GC-1. Note that GC-1 specifically states, “The awardee has full responsibility for the conduct of the project or activity supported under each award and for adherence to the award conditions.”

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 are paid directly by the MAA upon receipt of proper documentation. The MAA will only reimburse expenses up to the amount of the approved budget. Any unreimbursed expenses are considered cost sharing; these should be documented in the same manner as expenses for payment or reimbursement.

Before payment or reimbursement can be made, the workshop director and the MAA Staff Principal Investigator (PI) are required to authorize all expenses by signing the MAA Grant Expense Reporting Form. All requests for reimbursement must be received by the MAA within forty-five days of the conclusion of the workshop.

All requests for reimbursement or payment of expenses to an individual are to be submitted on an MAA Grant Expense Reporting Form, sample shown below. The form is simple because we only anticipate expenses for stipends and materials. For other types of expenses, please reach out to Kiera Palma, Director of Programs and Grants Management for consultation. The sample below indicates what the form looks like, but please use the one provided to you directly the week following your workshop – the forms are customized for each particular summer.

rev. 4/2022



MAA
MATHEMATICAL ASSOCIATION OF AMERICA

PROGRAMS
OPEN Math
Center for Research and Learning
and Center for Modeling the Mathematical
Practice of Undergraduate Mathematics

Grant Expense Reporting Form

Name Email

Address Phone

Grant Name & Number:
Please note: you may only select one grant. If you have expenses across multiple grants, you will need to fill out separate forms for EACH.

A. Stipend/Honorarium	Acct #: 6030	Task #: 800
Please complete this section if you are requesting a stipend or honorarium.		
Purpose of Stipend/Honorarium/Dates of Service:	Amount Requested	\$0.00
<input type="text"/>	Total Stipend/Honorarium	\$0.00
When submitting a request for a stipend or honorarium, please attach Completed W-9 Form.		

B. Other Expenses
Please describe and include receipts.
<input style="width: 100%; height: 100%;" type="text"/>
Total Other
\$0.00
With all travel reimbursement requests, please attach receipts of all expenses over \$25.

C. Total Requested
This section must be completed in order for reimbursement request to be processed.
GRAND TOTAL
\$0.00
(Stipend/Honorarium + Other)
By signing this form, I agree that this payment request is aligned with the agreed upon amount set between the OPEN Math workshop leaders and the Mathematical Association of America (MAA). This expense is supported by the MAA OPEN Math Program (NSF DUE-211260) for a workshop that was held between the dates of June 1, 2023 - July 31, 2023. My role as a workshop leader, speaker, and/or consultant was successfully completed and the workshop was run as originally proposed to the MAA.

**SAMPLE FROM PREVIOUS YEAR.
USE ONLY THE FORM PROVIDED TO YOU
DIRECTLY BY MAA PROGRAMS**

The form should be filled out completely, signed by the requestor, and then emailed according to the directions on the form. Proper documentation (original receipts, invoices, etc.) is needed for all expenses for materials or travel, and must accompany the MAA Grant Expense Reporting Form.