

## **Guidelines for the Cullen and Richardson Restricted Funds**

The Austin College faculty, during their faculty meeting on May 19, 2016, voted and approved the following guidelines:

The faculty approved four levels of funding when distributing these funds. The four areas of funding include: Sabbatical expenses, C/I Workshop, Annual Professional Development, and a competitive pool of money referred to as FLEX funds.

A priority was given to the funding related to sabbatical expenses. The faculty voted to allow each faculty member with an approved sabbatical project to receive up to \$5,000 of these funds to cover sabbatical related expenses. In addition, it was also voted on and approved to budget for an average of 13 sabbaticals per year (\$65,000) to be set aside and remain in a pool of "sabbatical money" to allow for the variances between high and low sabbatical demand years. This will reduce fluctuations in the remaining funds as well. This pool of money will be earmarked and accounted for separately from the remaining three categories of funds. One other issue related to sabbatical funding is that the faculty voted that a person, in their sabbatical year, may not receive any additional "Annual Professional Development" money. They may apply for money from the FLEX funds to help with sabbatical costs over the \$5000, but they will be last on the list for these funds.

The faculty voted and approved to use \$5,600 per year to fund C/I Workshop, which will remain outside the nine month contract period. This amount of money would cover two days of training at our current rates. The C/I Committee will determine the content and the number of days of workshops necessary to accomplish the C/I goals.

After applying the two above items, amounting to \$70,600, the remainder of the funds shall be split 80% for Annual Professional Development and 20% for FLEX (competitive pool).

Faculty voted and decided that the Annual Professional Development (APD) amount of funds will be divided evenly among the tenured, tenure-track, and visiting faculty members. Once again, the faculty members receiving sabbatical funding will not be eligible for APD funds in the same academic year as their sabbatical funding. *Amended 9/6/2016 – Full-time college employees with permanent, non-tenure-track positions and specific appointments involving significant teaching will be provided with an equal amount of annual Cullen funding as tenured and tenure-track faculty.*

The remaining 20% - FLEX (competitive pool of funds) will be available upon approved request of these funds. Faculty members may request additional funds for Professional Development. The Deans decide the appropriateness, necessity, relevance, and impact of the use of the funds. Separate guidelines were established by the FEC and are attached.

Unused sabbatical funds (by an individual) and unused APD funds shall be released and transferred to the FLEX pool of funds. An individual can either voluntarily release these funds (during an academic year) or any unused funds, in one academic year, shall become part of the FLEX pool for the following academic year.

These are the guidelines, approved by the Austin College faculty, as of May 19, 2016.

Steve Ramsey, Chair of the Faculty Executive Committee

### **Cullen and Richardson Guiding Principles for Competitive Pool of Funds.**

The Deans will evaluate the proposal to assure its alignment with the individual's CDP, his/her department's/program's objectives, and the charter of the original grants. Additional assessment should be made in light of the following principles:

- Lasting impact to the college.
- Equitable distribution of funds.

<b>Quick Reference:</b>	
<p><b>APD Funds:</b> \$1,000 maximum</p> <p><b>FLEX Funds:</b> up to \$1,000 (depends on budget and number of faculty)</p> <p><b>Sabbatical Funds:</b> up to \$5,000 per faculty member. Includes all travel during the fiscal year in which sabbatical is taken.</p>	<p>Includes all expenses, travel, lodging, food, registration, etc.; all anticipated expenses should be included in the proposal.</p> <p>If there are any changes expected, a revised proposal and/or budget revision, should be submitted prior to your travel.</p> <p>Retroactive requests for funding will not be granted.</p>
<b>Transportation:</b>	<ul style="list-style-type: none"> <li>• <b>Driving:</b> <ul style="list-style-type: none"> <li>○ Actual costs of gas or .20/mile up to the amount requested/approved (include a google map, at time of reimbursement, indicating miles)</li> <li>○ If you choose to drive, the lesser amount of gas/mileage and airfare will be allowed.</li> <li>○ If you are driving students, please see the <a href="#">Student Travel Policy</a></li> <li>○ Travel to and from DFW/DAL and airport parking for career development trips is not reimbursable. <ul style="list-style-type: none"> <li>▪ <b>Renting a car:</b> <ul style="list-style-type: none"> <li>• The college has a direct bill account with Enterprise and if you are transporting students, we recommend you use a rental car for liability purposes.</li> <li>• Do not elect additional insurance as the college's contract with Enterprise covers what we need.</li> <li>• You must complete the driver's education through campus police and be an approved driver prior to renting a vehicle on behalf of the college.</li> </ul> </li> </ul> </li> </ul> </li> <li>• <b>Flying:</b> <ul style="list-style-type: none"> <li>○ Luggage fees are only covered if requested/approved in the maximum amount of airfare. Be sure to include them in your request if anticipated.</li> </ul> </li> <li>• <b>Shuttle/Taxi:</b> <ul style="list-style-type: none"> <li>○ Only covered at conference location and if requested/approved.</li> </ul> </li> </ul>
<b>Lodging:</b>	<ul style="list-style-type: none"> <li>• Domestic: 3 nights maximum</li> <li>• International: 4 – 6 night maximum</li> <li>• Justification needs to be included on proposal for longer trips to be considered.</li> </ul>
<b>Food/Meals:</b>	<ul style="list-style-type: none"> <li>• <b>Itemized receipts are required for all meals &gt; \$5.00.</b></li> <li>• Maximum meal allowance is \$30.00 a day (this is not a per-diem and itemized receipts are required).</li> <li>• All meal receipts must be itemized and any tips should be added to the receipt. Taxes for meals are allowed. Please request an itemized receipt if it is not offered.</li> <li>• Alcohol is not reimbursed</li> <li>• Conference meals at a rate higher than the daily rate must be approved. Additional meal allowance may be approved at a pro-rated amount. Please indicate when submitting your funding request so that the committee can take it into consideration when determining award.</li> </ul>

<b>Advances:</b>	<ul style="list-style-type: none"> <li>• Advances will be released up to two weeks prior to travel.</li> <li>• Any expenses incurred prior to the trip can be reimbursed right away but will be treated as an advance (in the business office) to be sure that items being paid out are not duplicated.</li> </ul>
<b>Receipts</b> for reimbursements and to clear advances:	<ul style="list-style-type: none"> <li>• All reimbursements and/or advances should be completed within two weeks after the trip.</li> <li>• All receipts must show that they are paid in full.</li> <li>• All meal receipts must be itemized and any tips should be added to the receipt.</li> <li>• <b>Alcohol is not reimbursed.</b></li> </ul>
<b>Report:</b>	<ul style="list-style-type: none"> <li>• The report should be turned in with reimbursement request to be processed. (including copy of paper/presentation)</li> <li>• A copy of the report should also be submitted to your divisional dean.</li> <li>• These reports are kept in an individual's personnel file.</li> </ul>
<b>Taxes:</b>	<ul style="list-style-type: none"> <li>• We are tax exempt in Texas, Florida, Tennessee, New York and Connecticut for state taxes. If your receipts indicate state taxes for those states, the amount will be deducted prior to reimbursement. To obtain the tax exempt forms, please call or email <a href="#">Genni Kelso</a> at ext: 2431.</li> <li>• However, taxes for restaurant meals will be allowed per policy.</li> </ul>