

## **School of Education Policy & Procedures Manual**

### **Title: Request for Additional Research Travel Funds**

**Approved: 7/28/2006**

**Revised: April 7, 2011**

#### General

It is the intent of this policy that additional research funding support will only be provided for conference travel for *refereed* presentations that are of importance to the School of Education's Identity and Mission.

Revised policy for awarding additional research travel funds beginning AY09 is as follows:

Faculty members must provide evidence that one or more presentations awarded Additional Research Travel Funds in the previous year has been submitted for publication.\*

Also required is a brief statement to justify that the major conference presentation is important and central to your line of research.

\* To ensure our new faculty have every opportunity to be successful at third year review, rather than a previous presentation, second year faculty may instead provide evidence of submitting any manuscript for publication.

Revised policy for awarding additional research travel funds beginning AY10 is as follows:

When the per diem per day reimbursement option is not being used for meals, you must provide itemized meal receipts (not just the credit card receipts).

Reimbursement of expenses for graduate students must be requested on an Authorized Payment form available online at by logging into Dori, Index of Sites, click on Controller, then Accounts Payable to select Authorized Payment form.

Revised policy for awarding additional research travel funds beginning April 7, 2011 is as follows:

Additional Research Travel will only be funded via this policy if the presentation is at an important, refereed conference associated with the requester's discipline of research. Due to financial exigencies, requests such as those that appear to be related to low-quality conferences in locations of significant distance and expense or settings that do not appear to be an extension of research presented by the requester at major national conferences cannot be funded. To be clear, the intent

of the Additional Research Travel Fund policy is to support high-impact presentations defined as those that allow faculty and students to interact with the community of scholars central to their area of research and to enhance the reputation and visibility of the School of Education in these important scholarly forums. This aspect of the policy in no way limits what can be researched or where the research can be presented. Rather, it simply indicates that Additional Research Travel Funds are discretionary and the Dean's office will only fund travel associated with high-impact conference presentations.

The Request for Additional Research Travel Funds Form is available on our website at the following link <http://www.duq.edu/education/ppm/index.cfm> under Appendices.

This form is in compliance with the University's policy on Non-Reimbursable Expenses which can be found on our website by logging into Dori, Index of Sites, click on Controller, then Accounts Payable to select Non-Reimbursable Expenses.

The travel plans are processed in the originating Department Office. Awarded funds will be reallocated from the Dean's Office.

**Request for Additional Research Travel Funds**

Faculty / Graduate Student (please circle)

Name \_\_\_\_\_ Date of Request \_\_\_\_\_

Name of Program and Department \_\_\_\_\_

Name of Event \_\_\_\_\_

Sponsoring Organization \_\_\_\_\_

Location \_\_\_\_\_

Dates of Attendance: From \_\_\_\_\_ To \_\_\_\_\_

- Attach an APA formatted citation of the presentation and document(s) from the conference host stating your acceptance of the proposal.
- Attach itemization of all anticipated expenses for which you are requesting research travel funds. To insure that all funds are reimbursable, please see attached non-reimbursable expenses.
- Faculty must attach evidence of previous year presentation having been submitted for publication. Provide brief written justification that your presentation is central to your line of research.

Total Amount of Need for Event	\$ _____
Departmental Professional Development funds currently available:	\$ _____
Amount Requested (Need – PD Funds Available)	\$ _____

I certify that the use of the research travel funds will be in accordance with University policy and that the amount of the SoE Faculty Presentation request will not exceed \$1,500 (\$1,000 for Graduate Student Presentation request on a one-time request per academic year basis.) \*See Instruction #3

\_\_\_\_\_  
Signature of Requester

Chair:            Approved \_\_\_\_            Not Approved \_\_\_\_

Chair's Signature \_\_\_\_\_ Date \_\_\_\_\_

Associate Dean:            Approved \_\_\_\_            Not Approved \_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Dr. Jeffrey A. Miller

Budget Officer Reviewed: \_\_\_\_\_

Dean:            Approved \_\_\_\_            Not Approved \_\_\_\_

Dean's Signature \_\_\_\_\_ Date \_\_\_\_\_

Dr. Olga Welch

**After signatures:**

Original to: Budget Officer  
Copies to: Chair and Requester

**Instructions for Requesting Additional Research Travel Funds**

1. Approval in advance is required. The process requires the approval of the Chair and approval of the Associate Dean for Graduate Study and Research, and final approval of the Dean. Funds may be requested between July 1 and April 1, and must be used by May 1 (unless special arrangements are established due to your conference date).
2. Please check with the Chair for your professional development fund account balance.
3. Additional funds may be requested on an academic year basis. The Faculty maximum amount is \$1,500.00 for presentation at two conferences and for a Graduate Student the maximum amount is \$1,000.00 for presentation at one conference.
4. After this request is signed by the Chair, the Chair will forward it to the Associate Dean, and it will be reviewed by the Budget Officer. The Department Chair will be notified by the Dean's office with a signed copy of the form. It takes two weeks to process this form, so plan accordingly regarding the timing of the request because advanced approval is required.
  - a. After travel has been completed, faculty must secure a *Report of Business Expenses (RBE)* form and Graduate Students must secure an *Authorized Payment* form by going onto our website and logging into Dori, Index, click on Controller, then Accounts Payable to select the necessary form. Submit the completed form along with your original receipts.
  - b. *Report of Business Expense (RBE)* or *Authorized Payment* form and receipts must be submitted to the Department Office for processing within 21 days from the completion of your travel.
  - c. Keep a copy of all forms and all receipts for your records. **Original receipts must** be submitted with your *Report of Business Expense (RBE)* or *Authorized Payment* form, including airline ticket receipts. If original receipts are not included you will not receive your reimbursement for that item.
  - d. Personal auto miles reimbursable rate can be found by going onto our website and logging into Dori, Index, click on Controller, then Accounts Payable under the heading Quick Reference. Mileage is calculated from Duquesne University to the destination, not from your home.
  - e. Personal meals may be reimbursed at a per diem per day rate which can be found by going onto our website and logging into Dori, Index, click on Controller, then Accounts Payable under the heading Quick Reference. You need not submit receipts for meals, if you are taking the per diem. Otherwise, original itemized receipts for meals (not just the credit card receipts) will be reimbursed at cost as long as expenses are reasonable.
  - f. Personal expenses such as alcoholic beverages, movies, exercise room charges, or personal grooming costs are not reimbursable. (see attached list)
5. If your request is not approved, the Chair of the Department will communicate to the requester the explanation.

## ***Non-Reimbursable Expenses***

Duquesne University's policy on Other Business Expense Reimbursement meets the Internal Revenue Service (IRS) definition of a reimbursable expense. As a result, expenses that conform to this policy are not reported as taxable income to the individual. Certain expenditures that do not conform to this policy *will not* be considered reimbursable under it.

***Items of a personal nature shall be carefully segregated from University expenses and are not reimbursable.***

### **Such items include but, are not limited to:**

- Car rental insurance purchased for domestic travel.
- Childcare.
- Fees for Frequent Flier programs and other similar rewards for hotel and car rentals.
- Hotel Amenities: i.e. fitness and recreational fees (including massages and saunas) and in-room movies.
- Incidental expenses: personal recreation expenses, movies, snacks, or any other expense not directly related to, or necessary for, the performance of the travel assignment.
- Insurance costs: i.e. life insurance, flight insurance, personal automobile insurance, and baggage insurance.
- Loss or theft of Cash Advance funds, airline tickets, personal funds or property.
- Lost baggage.
- Memberships to private clubs.
- "No-show" charges for hotel and car service  
-See Section on *Lodging*.
- Parking tickets or traffic violations.
- Passports.
- Personal automobile repairs.
- Personal credit card annual or late fees.
- Personal grooming services (such as barbers, hairdressers, shoe shines).
- Personal telephone charges in excess of reasonable calls home, generally one per day.
- Personal travel while on official University business, and travel expenses for family members.
- Pet care.

- **Social memberships in general are not allowed.**  
Requests for exception to this policy can be made in writing to either the President or VP of Management and Business and must delineate clearly the business purpose of the membership being requested.
- Spouse or guest travel  
-See Section on *Travel Expenses of Spouse/ Personal Guest*.
- Upgrades (air, hotel, car, etc.).