

Development Funds Policy and Procedure Academic Year 2012-2013

The Department Chairs have defined the following procedures and schedule for implementation of processing development funds for the Academic Year 2012-2013.

DEVELOPMENT FUNDS GUIDELINES

- All Development Funds expenses are subject to approvals from both the Department Chair (DC) and the Associate Dean (AD) of Academic Affairs.
- Faculty members must submit a 'Development Fund Proposal Form' to their respective DC by **January 31, 2013** to ensure their funds are reserved. After January 31, 2013, unreserved funds *may be* reallocated within a discipline, department, or school-wide.
- Developmental funds of \$2,500 are available to all tenure/tenure-track faculty members, along with Academically Qualified Practitioner Faculty members for the 2012-2013 academic year. Practitioner Faculty who teach at least 12 credits are eligible for development funds per the following schedule:
 - a) 21+ units: \$2,000
 - b) 16-20 units: \$1,500
 - c) 12-15 units: \$1,000

Additional funds may become available on an exception basis and must be approved by both the DC and AD. No more than \$5,000 of funding may be awarded to any one professor within an academic year.

- Receipts for all expenses must be submitted within 45 days of *purchase date*. Receipts received by Academic Affairs past this deadline risk non-reimbursement per University policy.
- ***Please obtain approvals before making purchases.*** Expenses paid by the faculty prior to approvals will not be reimbursed until proposals are submitted and appropriate approvals are obtained.
- Purchases of books, equipment, journal subscriptions and similar "non-consumables" goods are subject to a limit of \$1000 per academic term. Additionally, purchases of "non-consumable" items exceeding \$100 in cost must be made through the Academic Affairs Finance Manager. Please consult Jonathan Lee (x5745) for these purchases. Faculty members who pay for these items directly risk non-reimbursement per University Policy.
- Funds approved for specific event/items are not transferable for other usage. A revised development funds proposal is required to be submitted through the proper channels prior to these expenditures.
- Journal submission fees up to \$200 (per submission) are eligible for payment by the University outside of the normal development fund pool pending DC and AD approvals. Excess fees may be covered with development funds with appropriate approvals as well.
- All development funds must be spent and expensed to Academic Affairs by July 31, 2013 (end of fiscal year). Specific notices and deadlines will be given as the end of the Fiscal Year End approaches.
- For conference travel, expenses impact the budget in the fiscal year in which the conference takes place, not necessarily when the expense is incurred (e.g. if expenses are paid in July 2012 for a conference that occurs in August 2012, these expenses will impact fiscal year 2012-13 budgets)

If you have questions, particularly as it pertains to which activities are considered to be within the scope of development funds in nature, please contact your Department Chair.

DEVELOPMENT FUNDS REQUEST/SUBMISSION PROCESS

1. Complete the Development Funding Form.
2. Submit the form **via e-mail** to your Department Chair for approval/signature.
 - (The faculty member/Chair can simply type their name on the signature lines.)
3. Once the proposal is approved by the Department Chair, he/she will forward it **via e-mail** to Jonathan Y. Lee, the Finance Manager for Academic Affairs.

Department Chair	Disciplines	E-mail
Peggy Crawford	Finance/Accounting	Peggy.Crawford@pepperdine.edu
Ann Feyerherm	Applied Behavioral Science/ Organizational Theory	Ann.Feyerherm@pepperdine.edu
John Mooney	Strategy/Information Systems/Entrepreneurship	John.Mooney@pepperdine.edu
Rick Hesse	Decision Sciences/Marketing	Rick.Hesse@Pepperdine.edu
Terry Young	Economics/Business Law	Terry.Young@pepperdine.edu

4. Jonathan will have Dave Smith, the Associate Dean of Academic Affairs, review the proposal for final approval.
5. Jonathan will notify the faculty member via e-mail whether or not the proposal has been approved.
6. Depending on the purpose of the funds, travel/purchase arrangements can be made with Finance Manager, Jonathan Y. Lee in Academic Affairs.
7. Expenses should be submitted within 45 days of purchase date using the Expense Report Form. Please review the Expense Reporting Procedure for assistance in submitting your expenses.

For more information:

Jonathan Lee
Academic Affairs Finance Manager
(310) 568-5745
Jonathan.Y.Lee@pepperdine.edu