**Endowed Chair**

**Discretionary Spending Procedures and Chair Requirements**

**July 1, 2016 – June 30, 2017**

The aim of an endowed chair is to enhance the quality of higher education by strengthening instruction and research and to promote economic development in Louisiana. The University awards endowed chairs to eminent faculty members and researchers whose accomplishments in research, scholarship or creative works and academics or professional service progress the mission of their departments or colleges, the University or the State. As a chair holder, the expectation is that you will continue to exemplify excellence through appropriate measures *(e.g., grant funding, publications, performances, exhibitions, industrial ties, technology transfer, teaching innovations, pedagogical approaches, mentoring students, scholarship of teaching and learning, academic/economic development activities, signature initiatives, and leadership positions with community, regional, and national professional and public organizations)*.

Duties of this chair include that you will maintain and further a robust research record evidenced by distinguished intellectual contributions and participate fully in the academic activities of the academic unit in which the chair is awarded. Further, **at the end of the academic year, you will submit an annual report of academic activities undertaken as a result of the chair and a letter to the donor (if known) providing an overview of pursuits.** The annual report and letter will be sent to this office.

This chair is reviewed every three academic years. **Allocation funds are for the University’s FISCAL YEAR (July 1, 2016, through June 30, 2017). Funding does NOT roll over to the next fiscal year.**

**It is essential that you carefully read the following information in its entirety to ensure that you understand the information contained within - as it concerns the use of chair discretionary funds and the process for use.**  **Please keep this in a safe place for future referrals.** The intent of the process changes indicated below is to reduce the paperwork that you must generate in order to use the discretionary allocations and to avoid confusion by having only one set of policies to follow.

Your chair will be **assigned a six-digit account number** **to be used on ALL chair correspondence**. This number will consist of the **Foundation’s chair account number and the prefix 7** *(e.g., if the chair number is 01234, then the account number will be 701234)*. At some point during the Fall semester, you will use the account number to **log into Banner to track your fund balance and to designate fund categories**. The default type for all chair allocations will be “Travel.” To use funds for equipment, it will be necessary to log into Banner to re-designate funds from travel to equipment. **Until the system is ready for use, you will need to keep an account of your spending and the funds remaining in your Chair account.** Once the Banner system is set up for accessing your account, you will be notified and sent information on how to use it.

Keep in mind that expenses en route from your office may not yet have been received at their final destination in Administrative Services - where the final payment is made and recorded. Consequently, similar to a personal checkbook, you will need to note and **track any and all expenses made from your chair account**.Neither the Office of Faculty Affairs nor the UL Foundation will be able to provide information on discretionary account balances. **It is imperative that you keep copies of any submissions** (including all forms and receipts). Please note that in MOST cases receipts MUST be itemized – **for travel ALL MEAL RECEIPTS will need to be itemized**

To use your discretionary allocation for **travel**, **submit** a completed **Travel Request Form** prior to traveling. Travel requests received after travel has begun or occurred will not be processed. On both the Travel Request and Travel Expense forms, **be sure to include the account number** (e.g. **7**01234). On the Travel Request Form, **you and your department head will both sign on the *Project Director* signature line**, then **enter the account number under *Department Charged***and the **amount under *Funds Limited To****.* Incomplete forms will be returned for completion.

Once your **approved** Travel Request Form is returned to you, you may use a State-issued travel card for most travel expenses. All State policies apply to travel. ***(The exception is that chair holders using chair funding for travel will need to submit itemized receipts for all meals. The University will reimburse for the amount shown on the receipt UP TO the maximum amount allowed on this year's state travel per diem.)*** Information on travel policies and on obtaining a State Travel Card is available at <http://administrativeservices.louisiana.edu/travel>. It is no longer necessary to submit a Foundation Request for Funds Form nor is it necessary to route Travel Requests through the Office of Faculty Affairs for approval.

For **equipment** purchases **over $1000**, submit a Purchase Requisition. For **equipment** purchases **under $1000**, submit a Purchase Requisition or use your LaCarte Card. On all Purchase Requisitions or LaCarte Card logs, **be sure to include the account number** (e.g. **7**01234). Incomplete forms will be returned for completion, and it is no longer necessary to submit a Foundation Request for Funds Form nor is it necessary to route equipment requests through the Office of Faculty Affairs for approval.

To purchase **software and/or computers**, you must contact the Information Technology Department. Begin by calling the Help Desk at 482-HELP (5516). They will direct your call to the individual who can best assist you with your specific needs. The IT Department will provide you with University instructions and procedures regarding ordering.

It is important to note that **purchases paid for with chair funds are NOT personal property**. The items/equipment purchased **are University property**. Consequently, all purchases MUST follow ALL state regulations and be inventoried and tagged as appropriate. Contact the Office of Purchasing for information on purchasing policies and LaCarte Cards at http://administrativeservices.louisiana.edu/travel. The use of personal credit cards is strongly discouraged.

Please allow a generous amount of time for routing and processing all paperwork, especially travel and purchase requisitions. The recommendation is 4-6 weeks. The **DEADLINE** to **submit Travel Requests and Purchase Requests** is **March 29, 2017**. This date will be a couple of weeks before the University’s deadline to allow appropriate time for Administration and Finance processing.

Our goal is to support your activities as endowed chair holders and to have processes in place that will allow you to focus on your research, scholarship or creative works, teaching and/or professional service.