



A Message From The Provost
RABBI ANDREA L. WEISS, PH.D.

July 25, 2022

Dear Colleagues,

With the start of a new fiscal year on July 1, I am writing with updated information about your Faculty Travel & Research Fund. This memo outlines the rules and regulations concerning FTR in 2022-23. As always, Lynn Flanzbaum, the Finance Manager supporting the Office of the Provost, does a great job conscientiously managing FTR. If you have any questions about your FTR funds, please contact Lynn at lflanzbaum@huc.edu.

FTR Budgets for 2022-23

Although the College-Institute continues to face large deficits and serious financial challenges, we are restoring Faculty Travel and Research budgets to their pre-COVID levels as recognition of your continued commitment to the College-Institute and our continued commitment to providing you with the support necessary to advance your work.

Despite another financially difficult year, we have worked hard to ensure this budget reflects our moral commitments. As a result, alongside a sizable deficit that I will detail below, you'll see targeted investments in people and programs that are intended to move us towards future stability and growth.

Your FTR budget for 2022-23 is ///.

Eligible FTR purchases

The **primary use of FTR for academic travel and research**, not for home office supplies. If circumstances require you to teach from home 2022-23 and you need additional equipment or materials, you can request to use your FTR funds for such expenses, contingent on prior approval from the Provost's office.

Expenditures that are eligible for reimbursement from the FTR Fund in 2022-23:

- **Travel for academic purposes** is eligible for reimbursement from the Faculty Travel and Research fund. This includes scholarly meetings (whether or not a paper is being presented) and travel to scholarly collections at libraries and archives away from your home campus. All institutional travel policies must be followed. Mileage will be

reimbursed at current IRS rates. Because this is a reimbursement fund, monies paid out are not considered income for the faculty member.

- **Materials used for research**, including books, journals, software, computers, tablets, printers/scanners, printer ink or toner, microfilms, DVDs, and CDs are eligible for reimbursement from the allotted amount. **However, the following conditions apply for hardware purchases:**
 - A computer, tablet, or printer that is purchased with FTR funds is considered the property of the College-Institute. **Such hardware purchases must be approved by the Director of Information Technology BEFORE the purchase is made.** Retain the email with the approval to submit with your reimbursement request.
 - If the faculty member leaves the College for reasons other than retirement, the hardware must be returned to HUC-JIR. At any point, the faculty member can offer to buy the equipment from HUC-JIR at the current market price of a comparable computer.
 - Because home internet access and/or broadband cable networking have now become a standard household utility, this is no longer covered by FTR. Internet access when traveling for HUC business or faculty research can still be reimbursed.
 - Service contracts or extended warranties MAY be covered by FTR with advance approval from the Director of IT. Insurance on hardware is NOT covered.
- **Individuals hired to assist with research**, including but not limited to research assistants, editors, translators, indexers are eligible for reimbursement.

These existing HUC-JIR policy guidelines remain in place when using your FTR funds:

- **Reimbursement requests must be submitted within 60 days** of making the expenditure using FTR Request for Reimbursement 2023.xlsx form. Reimbursement requests should be submitted no later than July 9 following the June 30 close of the fiscal year. **Expenses submitted more than 60 days following the date of purchase or after July 9 for prior year purchases risk not being approved for reimbursement.**
- FTR funds do not roll over from year to year. You cannot purchase items in one fiscal year and submit the receipts for reimbursement the following year.
- The fiscal year ends on June 30. In order for an expense to be charged to a given year's budget, the expense must be for goods or services that were paid for and provided within the year in question. Ordering items online on June 30, for example, might result in those items being delivered in early July. Since you would not have use of those items by June 30, the expense must be charged to the following year. Likewise, travel that is booked in one fiscal year but does not take place until the following fiscal year will be charged to the fiscal year in which the travel actually occurs. For example, if you book air travel in April 2022 for a conference in August 2022, we can reimburse you promptly; but the expense will be charged to the 2022-23 fiscal year.
- To comply with our auditing requirements, when submitting restaurant receipts, please include the itemized receipt listing what was ordered or purchased, along with the final

credit card receipt with a total and a tip. The latter alone is not sufficient for reimbursement.

- For payments by check that need reimbursement, please include one of these proofs of payment: either a copy of both the front and back of a cancelled check submitted or a copy of your bank statement or bank website that the payment was charged to your checking account.
- Travel insurance cannot be reimbursed.
- Direct Deposit of FTR reimbursement payments is required. To set up Direct Deposit, please contact Lynn Flanzbaum (lflanzbaum@huc.edu.)

Procedures for pre-approval and reimbursement of qualified expenditures:

- (1) **Travel related expenses** being charged to FTR **must be pre-approved** by the Provost prior to the planning/booking of the trip.
 - To obtain Pre-Approval, simply send an email describing the purpose of the trip and the approximate expense to the Provost's office (send the email to both aweiss@huc.edu and lflanzbaum@huc.edu). No forms are needed.
 - If there is enough budget in your individual FTR allocation to cover the projected cost and the Provost approves the travel, you will be notified by email, and you then can book/purchase the travel.
 - When the trip is complete, the faculty member should attach receipts for travel expenses and send the completed **FTR Request for Reimbursement 2023.xlsx** form to Lynn. Lynn will verify that the paperwork is in order and will submit it to the NBO for processing. Payment will be issued within 10 business days of receipt of the reimbursement request.
- (2) **Materials used for research** (including books, journals, software, computers, tablets, printers/scanners, printer ink or toner, microfilms, DVDs, and CDs): Include original receipts and submit directly to Lynn Flanzbaum using the completed **FTR Request for Reimbursement 2023.xlsx** form. Upon approval by the NBO, a payment will be issued within 10 business days.
- (3) It is possible to pay **external vendors** such as research assistants, editors, translators, or indexers directly from an individual faculty member's budget line. Please submit an invoice that indicates what work was done, when it was done, and where payment should be sent. If no invoice is available, Lynn can help you prepare a Payment Request form. If the vendor is new to HUC, a W-9 form and direct deposit form will be required.

Thank you for your attention to these procedures as you put your FTR funds to good use to enrich your academic work and enhance your teaching at the College-Institute.

Sincerely,

Andrea L. Weiss

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