
Chapter IX – Faculty Use of Whitman College Resources

The following are general guidelines for faculty in their use of College funds. These guidelines pertain to College funding, which includes, but is not limited to, the use of start-up funds, funds for professional development, ASID funds, grants from internal sources, student/faculty research awards, named chair and professorships, endowments, and department or division funds. Generally, department funds are to be used for instructional activities related to the academic program and not for professional development purposes.

The goal of these guidelines is to facilitate faculty research and teaching efforts while complying with Internal Revenue Service and grant funding agency regulations, and responsibly and effectively managing the College's financial resources.

Without proper documentation, reimbursements may be considered taxable income to the employee. The most general guideline is that expenses directly related to a faculty member's teaching or professional activity are allowed while personal expenses are not. The following guidelines are intended to provide clarity regarding that distinction.

In all cases, college employees must: 1) not have been, nor will be, reimbursed by any entity other than Whitman College; 2) demonstrate that expenditures are necessary to the business purpose of the College and are appropriate and reasonable in nature.

A. Allowable Expenses

Note: Appropriate permission should be received prior to incurring any travel, meal, or entertainment expense.

Expenses can be generally divided into three categories: 1) those related to individual faculty professional development, 2) those related to the delivery of department curriculum or other department business, and 3) those related to college business such as committee work, recruiting or guest lectures. All should be relevant to your teaching, research or college related business.

1. Individual faculty professional development expenses may include:

- Travel, lodging, and food for professional development purposes, such as travel to a professional conference or a research site.

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- Journal subscriptions and memberships in professional societies.
 - Registration for professional conferences that are virtual or online.
 - Materials related to research such as software, supplies, books, expendable supplies and minor equipment.
 - Editing, indexing, preparation of figures, and other costs associated with the preparation and publication of scholarly materials. Please contact the Associate Dean for Faculty Development before using your PDA for this purpose.
 - Limited wages for student assistance in support of a research project. Contact the Provost Office before using your PDA for this purpose.

2. Departmental business expenses may include:

- supplies or activities directly related to courses taught in the department (these could include independent studies or regularly offered courses)
- desk supplies for faculty offices in the department
- minor equipment for shared use of a department's faculty or students
- student departmental assistants
- meals and entertainment necessary for departmental business
 - Colleague meetings, departmental and interdepartmental, should be scheduled for times other than meals whenever possible.
 - Justification for all meal charges must include the number of diners, with the names of individuals (10 diners or fewer), or the name of the group (over 10 members), and the business purpose of the meeting.
 - limit of \$60 per person per meal (excluding tax and gratuity) for all dinners paid with any college funds, including endowments. The purchase of alcohol with college funds is limited to one drink per person, per meal (a 750 ml bottle of wine is considered four drinks).

3. Other College related expenses may include:

- Recruiting expenses – dining and/or travel *see limits above
- Visiting educators or guest speakers (when entertaining visitors and guest speakers, it is not reasonable for all members of the department, program, or group to attend multiple meals.)
- Meals associated with faculty committee meetings (must be previously approved by the Provost Office)
- Grants (internal or external)
- Department or Program External Reviews
- For visitors (recruiting, visiting educators, guest speakers, etc.) staying at the Marcus Whitman Hotel, the complimentary breakfast should be utilized. A faculty sponsor can dine with the guest using their JPMC card.

See also [Whitman College Business Office JP Morgan Purchasing](#) for more detailed college policies pertaining to purchasing and the use of college credit cards.

B. College Credit Cards – JP Morgan Chase (JPMC)

Faculty members using a College purchasing card are required to provide their card administrator (building assistant) with appropriate documentation and information as soon as possible, but **no later than the 22nd of each month** (two days after the closing). The college requires **itemized** receipts for **all** charges. Along with receipts, the card administrator needs to know what budget to charge and **the business purpose** for every credit card charge. For meals, the number of diners is required and for meals of ten or fewer, the names of said diners.

If a faculty member fails to obtain an itemized lodging receipt, they must contact the venue and ask that a copy be provided to their card administrator. Detailed documentation, preferably in the form of an email to the card administrator, must be provided for any charge not appropriately documented by a receipt. Failure to provide appropriate documentation/information for the charges on a credit card statement within the required time frame may result in:

- Washington State sales tax deducted twice on supply purchases;
- Charges applied to the default budget (typically the department budget);
- Charges become taxable income to the individual cardholder.

Consistent failure to provide receipts/information to the card administrator in a timely manner, several occurrences of using the JPMC card for personal expenses, or repeated overspending of allocated funds will result in the faculty member losing the privilege of using a College credit card.

C. Personal Reimbursement

A completed and signed IRS Form W-9 must accompany reimbursement requests for invoices (lodging or services) from an individual, landlord, or any unincorporated entity.

Whitman College funds cannot be used to pre-pay professional development expenses that will later be reimbursed by an outside agency or organization.

D. Family or Companion Expenses

College funds can only be used to pay for faculty travel and meals, and cannot be used to offset the cost of a spouse/partner's expenses.

E. Internet Connectivity Fees

The cost of connection to the internet while traveling on College business can be covered, but not for connecting from home.

F. Cell Phones

Cell phones and cell phone bills are not normally covered.

G. Home Office

Whitman College funds may not be used to furnish, improve, maintain, or supply a home office.

H. Ownership of Equipment and Materials

Any equipment, software, or other durable resources (including computers, furniture, digital cameras, MP3 players, lab/studio tools, books, etc.) purchased with the College and/or grant research funds are the property of Whitman College and remain so when a faculty member leaves the College.

I. Departmental Meals and Entertainment

Appropriate permission should be received prior to incurring any travel, meal

or entertainment expenses.

Discretion should be used when spending departmental funds for faculty/student entertainment. Only rarely should a department meeting entail food expense. At the beginning of the academic year or semester, departments should discuss any anticipated events for students that might involve expenses such as food and come to an agreement on department resources that should be spend on student entertainment.

J. Visiting Educators (Guest Lecturers)

Departments that have their own endowments for guest lecturers or unrestricted endowments are expected to use those sources of funding to support visiting educators. (see the section below on departmental endowment use). Departments without endowments may request funding from the Associate Dean for Faculty Development. Requests may come at any time of the year (at least two months prior to the date of a visit involving domestic travel, and five months prior to a visit involving international travel) but typically only one request per department will be considered each year. For this reason, it is important for department colleagues to periodically discuss anticipated plans for requesting visitors.

K. Departmental Endowment Use

In all cases, endowments and income generated by them, regardless of the department, program, or individual involved, belong to Whitman College. The “owner” of an endowment is the college officer who is responsible for the area supported by the endowment.

The individual, program or department has significant autonomy in determining the disposition of funds. However, the budget officer has final authority over such disposition.

Policy for administering Departmental Endowments:

Department chairs will be made aware on a regular basis of endowments designated specifically for their use; what the specified use of income is (if specified in the agreement); available income; and any other details needed to effectively use the endowment.

The office of the Provost and Dean of the Faculty will be kept informed by the Department Chair of how the endowment is being used.

Departments are encouraged to make regular use of endowment income to fund department expenses, faculty research, small equipment, enhanced computer capacity/software or other specific purposes. The Provost and Dean of the Faculty will reserve the right to redirect funding requests made by the departments to college-wide funding sources, or to departmental endowments, where necessary or appropriate.

This policy is intended to encourage wise use of endowment income, which will in turn allow existing College-wide funding opportunities to be made available to more faculty.

L. Office and Computer Equipment

Faculty are ordinarily assigned private offices. The Provost and Dean of the Faculty has ultimate authority in the allocation of space in all academic buildings.

As office space is a limited college resource, it must be managed and allocated in a way that promotes the advancement of the college's mission and is strategic priorities. Allocation of office space in academic buildings (Hunter, Olin, Maxey, Hall of Science, Harper Joy, Fouts, Hall of Music) is under the purview of the office of the Provost and Dean of the Faculty as the cabinet officer who oversees Academic Affairs. Decisions made regarding office space in academic buildings should align with support for the academic program of the college, and be flexible enough to respond to current and emerging needs.

“Office space” includes faculty offices, offices for staff who support the academic program, and conference rooms that are utilized to support the College's instructional and research functions.

Office space is allocated within the academic buildings according to these guidelines:

1. In general, office space allocation priorities are as follows:
 - a. Tenure, Tenure-Track, Full-time/Long-term Non-Tenure faculty, and Full-time Academic Affairs staff
 - b. Full time visiting Assistant Professors
 - c. Part-time Adjunct faculty

- d. Faculty who have retired from the college will be allowed to maintain an office for one academic year into their retirement, pending availability
- e. Faculty who are on a year-long unpaid leave of absence will relinquish access to their college office (per this faculty Handbook)
- f. Research Associates of any status may request but are not guaranteed an office

Unless there is a significant reason to maintain physical separation among offices within a unit, office spaces will be allocated in close proximity other offices within a department/unit. Having offices within close proximity of others within a unit facilitates department/unit cohesion.

2. At a minimum, the Provost and Dean of the Faculty or their designee will consult with the Chair of the faculty and a Department Chair/Program Director or Director of a staff unit as it considers space requests or designations. In addition, the Provost and Dean of the Faculty or their designee should consult with the appropriate division Chair and Division Assistant. Ultimately, the final decision or space designation rests with the Provost and Dean of the Faculty.
3. Offices will be assigned based on need, availability, and suitability for use.
4. Unless there are extenuating circumstances approved by the Provost and Dean of the Faculty, or their designee, requests to change offices are made by departments, not individuals. Department Chairs/Program Directors and Directors of staff units are responsible for making these requests.
5. Periodic evaluation of office space allocation may be requested of a department to ensure that office space is being used to maximum functionality and efficiency.
6. Computer equipment, software, and network access are made available through Whitman College Technology Services (WCTS). Priorities for allocation and purchases of equipment and software are determined by departments and WCTS.
7. Typically, computer hardware is provided upon the point of hire and regularly replaced based on the WCTS replacement cycle. New tenure-track faculty members with specialized needs beyond the standard setup

can use their professional development funds to make additional purchases in consultation with WCTS – Instruction and Learning Technology.