

## **CSU Travel Procedures FY 2014 - 2015**

### **Matching Funds Reimbursement**

The University Development Office will match 50% (up to \$5,000 per fiscal year) of all qualified donor-related travel for CSU front-line development officers and Deans actively seeking donations. Expenses will be reimbursed quarterly via a VTA transfer document. Funds will only be transferred to a 20, 30, 19, or 14 account. Please follow the procedures for reimbursement outlined below.

After travel is completed for the quarter, submit the attached form to Bobby Gonzalez via email (rgonz@austin.utexas.edu) or campus mail (University Development, A3000). It is the responsibility of the Chief Development Officer of each CSU to verify the expenses being presented for reimbursement are accurate and meet the General Guidelines for Reimbursement as noted below. Either a signature on the attached document or an email stating the reimbursement request is accurate with the form attached is required before the funds will be transferred.

After the required document has been received and reviewed (once per financial year quarter by the 15<sup>th</sup> of the following month), Bobby Gonzalez will transfer funds to your department's designated travel account. Email Bobby for exceptions to these requirements to be considered by Executive Director Karl Miller.

### **General Guidelines for Reimbursement**

1. Reimbursement is approved only for visits with 3 or more prospects (individuals, corporations, and foundations). Travel expenses for events or conferences will not be reimbursed. Exceptions can be made for travel to visit less than three donors and when attending a conference or event if the travel includes individual donor visits outside of the event. Conference registration fees will not be reimbursed.
2. Reimbursement is made **available for front-line development officers and Deans/Directors**. Expenses for faculty, or other staff members are usually not reimbursed. You are encouraged to take advantage of opportunities to involve other college personnel; however these expenses will need to be reimbursed by the CSU.