

## APPENDIX A

### The Evelyn Rhoads Wilson Endowment Fund For Professional Development

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#### Introduction

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These policies were first approved by the Chancellor on July 1, 1994. They are administered by the Provost, who will review them yearly and make recommendations regarding their administration to the Faculty Senate, which may also propose amendments.

#### Purposes

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Mr. Leonard Wilson graciously created and funded the Evelyn Rhoads Wilson Endowment for Professional Development for “faculty travel to meetings of international, national, and major regional professional academic associations for the purpose of participation in a conference program as a panel chair or paper presenter and the travel of major academic figures from other institutions to the University of Alaska Southeast for presentation of their research and meeting with resident faculty.” At this time, funds from this endowment are restricted to the first purpose.

The intention of the Evelyn Rhoads Wilson Endowment Fund is clear from the following language in the originating document:

Its [UAS’s] remoteness means that face-to-face meetings with those who share intellectual interests requires considerable travel and consequent expense. In this context, participation in an academic conference takes on special meaning: it may be the only time during the year that faculty members can meet personally with someone who shares their interests and who can offer an informed and critical perspective on their research.

#### Eligibility

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1. All faculty members in a continuing tenure-track appointment.
2. Visiting faculty members who have had a continuous sixty-percent or greater appointment for two years or more.

#### Qualifying Activities

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1. **Presenting a Paper:** The presentation must be to a group of peers and must be concerned with issues or topics of interest to the relevant discipline or science.
2. **Chairing a Panel or Participating as a Discussant:** The funds are intended to support those who have spent a significant amount of time and energy organizing and/or arranging or otherwise preparing for a panel discussion. Faculty who are honorary chairs or panel

participants and who have not prepared for the event as described above should not apply for funds.

3. **The Arts:** The funds may be used by those in the arts for travel to meetings of international, national, and major regional professional meetings for the purpose of having their creations or techniques critiqued and reviewed by peers. The funds are not to be used for demonstrations or performances to people who are not involved professionally in the arts.

## **Funding**

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The amount of the Wilson Fund for each year is determined by the interest that the principal in the University Endowment account accrues, added to the amount of matching general-fund dollars. The amount of these matching general-fund dollars shall be no less than 25% of the interest available, and the maximum is determined each year contingent upon the availability of funds in the UAS budget.

By February 1 of each year, the University of Alaska Foundation will advise the Provost of the amount of anticipated interest available. By September 1 the Provost will determine the amount of general funds available and inform the Faculty Senate.

## **Availability of Funds and Application**

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**Funding Amount:** Approved applications could receive up to \$1,500 for the costs of qualifying activity on the basis of first come, first served basis. *Under no circumstances will an applicant profit financially from the Wilson Fund.* Funds available to distribute in any single fiscal year shall be established by the amount of funds earned the previous fiscal year.

**Number of Applications:** Multiple applications may be submitted in any fiscal year (July 1 through June 30), so long as the total allocation to any individual faculty member does not exceed \$1,500 in a fiscal year. When the number of approved applications reaches the amount of anticipated revenue, notice will be published that further qualifying applications will be held in line in the order in which they were received, should cancellation of travel occur or other funds be made available.

**Dates and Deadlines:** To be considered for Wilson Fund support, applications are submitted to the Office of the Provost. Applications are accepted between July 1 and June 1 for qualifying activities that occur within each fiscal year (July 1 - June 30). Applications will be responded to within ten days.

**Questionable Applications:** Applications deemed questionable will be forwarded to the Faculty Senate, which will consider the application and, if deemed necessary, offer the applicant a chance to explain the application. The Senate, through its Chair, may then confer with the Office of the Provost with regard to approving or denying the application.

**Travel Policies:** Wilson Funds are disbursed in accordance with UAS travel policies and procedures, which require a Travel Authorization (TA), including a request for "travel advance" when so desired, a TER, and original receipts.

**Procedure:**

**(1) Memorandum of Application:** An application is prepared in the following format:

Date:  
Through: [Dean/Director]  
To: Office of the Provost  
From: [Applicant's Name]  
Subject: Wilson Fund Application

The application will begin with this statement:

I have read the UAS policies regarding application for the Evelyn Rhoads Wilson Endowment Fund for Professional Development and believe this application meets the criteria, intent, and spirit for which this endowment was created.

**Next:**

Describe the activity.

Indicate the amount of Wilson Funds required and indicate the amount(s) being applied for from other sources (as applicable).

Identify (and attach) documentation (a) that the activity involves the applicant in a substantive way and (b) that the activity is scheduled. Generally, a letter or acceptance and/or a program agenda will suffice.

Include other pertinent information.

**(2) Travel Authorization (TA):** A Dean/Director-approved TA is required for all university travel (whether reimbursable or not) in order to be covered by University insurance provisions. The TA should accompany the memorandum. If it does not, the applicant must ensure that prior to travel, the TA is (1) approved by a Dean or Director and (2) routed to the Office of the Provost.

**(3) Wilson Fund Activity Report and Travel Expense Report (TER):** With the TER, a memorandum is prepared in the following format:

Date:  
Through: [Dean/Director]  
To: Office of the Provost  
From: [Applicant's Name]  
Subject: Wilson Fund Activity Report

The report will begin with this statement:

I have read the UAS policies regarding the Evelyn Rhoads Wilson Endowment Fund for Professional Development and believe this report describes activities which meet the criteria, intent, and spirit for which this endowment was created.

**Next:**

Describe and evaluate the activity and the applicant's participation (e.g., benefits gained; critical assessment of activity; and insights gained).

Identify (and attach) evidence that the activity took place (e.g., a letter of thanks and the final program).  
Identify (and attach) a TER (including originals of all receipts) approved by a dean or director.  
Include all other appropriate information.

## Schedule

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**February 1 (any year):** The University of Alaska Foundation advises the Provost of the anticipated amount of Wilson Funds available.

**September 1 (same fiscal year):** The Provost (1) determines the amount of general funds available and calculates the amount available for Wilson Fund applicants and (2) announces to the Faculty **Senate** the amount available.

**July 1 - June 1 (same fiscal year):** Applications are accepted for activities between July 1 and June 30 of the same fiscal year.

**Within 10 work days of application:** Applicants receive acknowledgment of application and are informed of its status.

**Within 15 calendar days of completion of travel:**

Applicants submit a Wilson Fund Activity Report and TER.

(By July 15 of any year, all TERs for June travel must be submitted.)