Policy Name: General Guidelines for Programmatic Investments/Recruitment and Retention; Other Department Support

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What is programmatic investment/recruitment and retention?
Funding for faculty recruitment/retention, start-up funds and related equipment. Generally these funds are not used for major renovations or funding for ongoing operating expenses.

What is Other Department Support?
Agreements made to fund a department’s or a program’s operating expenses. “Deals” can be one time or on-going and include related entity funding, loans and mortgages.

Programmatic Investment/Recruitment and Retention or Other Department Support Agreement
- All agreements should be in writing, detailing arrangements, time frame and amounts.
- The only agreements subject to these guidelines are those made with the Dean’s Office. Service arrangements are not intended to be included here.
- Copies of Programmatic Investment/Recruitment and Retention, Other Department Support (including Core Research Services support) agreements should be forwarded to Lisa Danko, Budget Office.
- Each agreement must have a separate project in which only costs relating to the Dean’s Office agreement are collected, and no other expenses are charged. If the agreement has several sections, each section should be a project (e.g. recruitment package with salary, equipment, new faculty recruitment, discretionary funds etc.).
- Request a project to be set up by YSM Business Operations (Ken Hoyt, 785-4449) in the designated sources. The project will be linked to award 0067AM.
- Type of support will be differentiated by a coding in OGM (coded by YSM Business Operations). (1 = Programmatic Investment, 2 = Other Department Support, 3 = Core Research, 4 = Rebates).
- All funding transfer requests are reviewed by the Budget Office/David Crockett prior to funding. Expenses will not be reimbursed if documentation of the agreement is not on file in the Budget Office.

How should I review and fund these projects?
- All expenses need to be posted as incurred – the accounts should be kept current and no large year-end transfers of expenses should occur.
- Review transactions at least monthly as part of month end review for appropriateness of charges.
- Request fund transfers when activities have ceased or by the end of the fiscal year if the activity is on-going.
- Expenses not charged to appropriate project, will not be reimbursed.

Please contact the YSM Budget Office – Lisa Danko 785-7459, with any questions on these guidelines.