Anderson Funds
FAQ on Acceptable Expenditures – Rules and Procedures

Q. What is an acceptable expenditure?
A. An acceptable expenditure constitutes items related to research or travel, for which you requested money in Anderson application. These expenditures may include:

- Airfare
- Lodging
- Meals
- Ground transportation (i.e., subway, bus, train, taxi)
- Conference registration fees
- Materials to carry out research (i.e., digital recorder, photocopies of surveys, books)
- Admittance fees to sites related to research (i.e., museum entrance fees)

Q. What is an original receipt?
A. Original receipts are the original proof of purchase of an item. Please note the following about original receipts:

- Photocopies, scanned copies, or email printouts are not permitted, except in the case where the company only issues e-receipts (i.e., airline tickets).
- In the case of airline tickets, boarding passes do not count as receipts. You must provide proof of purchase of airfare.
- Receipts must show the name of the company, the date of purchase, and the amount.
- Receipts must also be itemized, meaning they list what you purchased. Submit the itemization along with the credit card charge slip.
  - Credit card billing statements are not receipts, and are not accepted.
- Receipts must indicate that you are the payer. We cannot cover receipts issued in a name that is not yours.

Q. My receipts will not be in my name because I am using someone else’s credit card or making arrangements through a third party. What do I do?
A. Please contact the faculty members of the Anderson Committee prior to making any purchases to clear this with them. Failing to submit receipts in your own name without prior authorization may raise red flags and cause your receipts to be rejected.

Q. Do I need to submit documentation other than my receipts?
A. If you purchased airfare, we need your boarding passes in addition to your receipts.

Q. How do I submit my receipts?
A. You submit your receipts along with your report; download the correct forms and follow the instructions on the website and on the form. All documents go to Jacquelyn Moon in Johnson Hall, 101A.

Q. Does submitting an original receipt mean I am automatically approved for the expenditure?
A. No! Here are some restrictions:
• Restaurant receipts must include the itemization of food and beverage items purchased; do not just submit the receipt the credit card charge slip
• Individual meals above 25 USD are not covered
• We cover only three meals a day; receipts for more than three meals are not covered
• Alcohol is not covered
• Meals for someone who is not you are not covered, unless the meal was clearly research related (i.e., you took an interview subject to lunch). These instances must be noted and justified on the Budget Report Worksheet – and too many of these instances will raise red flags
• Airfare classes other than economy (i.e., the cheapest ticket available) are not covered.

Q. I am not staying in a hotel; I am staying with friends or family, or have made an informal arrangement with someone for my lodging. How do I create a receipt?
A. We only cover lodging through hotels, beds and breakfasts, or established, reputable, and legitimate rental/room-share websites (i.e., AirBnB), for which you can obtain an original receipt or e-receipt. Choosing to stay with family or friends is encouraged, but is not a covered expense.

Q. I am traveling to a place where it is difficult to obtain original receipts. What should I do?
A. You should work with the faculty members of the Anderson Committee prior to your departure to establish a reasonable per diem rate for items that do not come with receipts. Failure to establish this per diem rate prior to departure may result in your need to return Anderson Funds after you come home.

Q. I lost my receipts. What do I do?
A. Do not lose your receipts. We cannot cover expenses that do not come with receipts. Remember that failure to produce original receipts may result in the need to return Anderson Funds.

Q. I lost my boarding passes. What do I do?
A. Do not lose your boarding passes. They are proof you took your trip.

Q. How far can my receipts deviate from the expenditures I anticipated when I submitted my application?
A. Small deviations in items such as airfare, lodging, meals, ground transportation, supplies, etc., are fine, and there is space to justify deviations in the Budget Report Worksheet. However, large deviations—such as visiting different cities or countries, changing the length of your visit by more than 3 days, changing your core research questions or research methodology—require prior approval by the faculty members of the Anderson Committee. Please clear any large deviations prior to your trip with the faculty members of the Anderson Committee; failure to do so may result in your need to return Anderson Funds after you come home. If you have questions about what constitutes a large deviation, please contact the faculty members of the Anderson Committee prior to your trip.

Q. There is an emergency or crisis that has interfered with my trip, which will prevent me from spending the money as planned. What do I do?
If this crisis occurs prior to your trip, contact the faculty members of the Anderson Committee; do not leave for your trip without clearing any changes with the Anderson Committee. If this crisis occurs during your trip, contact the faculty members of the Anderson Committee as soon as possible. Depending on the nature of the emergency, the faculty members will work with you to establish a new plan. Failure to effectively communicate with the Anderson Committee about any disruptions to your travel or research may require you to return your Anderson Funds.

Q. Who are the faculty members of the Anderson Committee?
A. The faculty members of the Anderson Committee are listed on the website. For 2013-2014, the faculty members of the Anderson Committee are Professors Thalia González (thaliagonzalez@oxy.edu) and Jennifer Piscopo (piscopo@oxy.edu).