

Official Functions, Discretionary, & Entertainment Expenditures

Guidelines for Office of Administration Departments

I. PURPOSE

This document is intended to provide guidelines regarding official functions, entertainment, and other discretionary expenditures. It is not a substitute for the University's official policies and procedures.

II. DEFINITIONS

- A. Discretionary expenses: Those expenditures not directly related to the University's educational, research, and public service mission.
- B. Entertainment expenses: Expenditures for food, beverages, tickets for shows or athletic events, and related supplies for events that involve one or more university employees and/or one or more guests.
- C. Official functions: Those social functions, entertainment events, quasi-social functions, meetings, special events, and conferences that can be demonstrated to provide clear benefit to the educational, research, or community service missions of the University.

III. GUIDELINES

A. Required Documentation

- 1. Itemized receipt (reimbursements) or a detailed invoice (payments).
- 2. Provide a detailed description of the nature and purpose of the event, including honoree(s), and a specific statement on how it supports the University's mission. General and broad statements will not be accepted.
- 3. Date(s) and location of the function.
- 4. For groups of 10 or fewer, list the participants' names, titles, and relationship to the University. For larger groups, provide the honored guest's name, attendee count, and their general relationship to the University.

B. Required Approvals (must be documented via signature or email)

- 1. Reimbursements (due to Business Office within 60 days of transaction):
 - i. The employee incurring the expenditure and their supervisor.
 - ii. Executive director or assistant vice president.
 - iii. Senior associate vice chancellor/vice president for Administration, if the host is the executive director or assistant vice president.
- 2. Payments via voucher or P-Card (non-reimbursement):
 - i. Executive director or assistant vice president.
 - ii. Senior associate vice chancellor/vice president for Administration, if the host is the executive director or assistant vice president.
- 3. Refreshments or meals for meetings limited to university employees:
 - i. Senior associate vice chancellor/vice president for Administration.
- 4. Official functions expected to cost more than \$5,000:
 - i. Senior associate vice chancellor/vice president for Administration.
 - ii. Senior associate vice chancellor/vice president for Administration & Finance.

IV. REFERENCES

MAPP 05.02.02 – Official Functions and Discretionary Expenditures
SAM 03.A.02 – Entertainment Expenditures