

Viterbo University

Guidelines for expenditures from University Funds

3-3-20

Alcohol:

Expenditures for alcoholic beverages should be strictly limited and must have the approval of the President. The primary purpose of an expenditure must be for the benefit of the university and, therefore, not for the direct benefit of an employee.

Retirements:

It is understood that the university will cover the cost of one retirement celebration per employee. This may be at the university, department, or school level- whichever is preferred by the employee. No additional funds will be provided for multiple celebrations. The President's office will offer a dinner on campus and a small gift to all retirees on behalf of the institution.

Celebratory Gatherings:

Departments may choose to celebrate other special events such as a baby shower or birthday. These celebrations must be funded by the employees, and the use of university funds is not allowed.

The university provides hospitality for the following university wide events for employees:

- Christmas Party
- Community Dinner
- St Francis Day Lunch
- Hospitality Committee Events

Business Meals:

A business meal is defined as a meal that includes more than one person, includes at least one university employee, and has a substantive business purpose essential to the university's mission. Funds that can be used for discretionary purposes and other non-appropriated university funds may be used for business meals. Recruitment of faculty/staff is an example of business meals. In this case, the candidate being interviewed must participate. Guests of the candidate and the employee may attend for a valid

university business purpose (e.g. attendance improves the chances for a successful recruitment outcome).

As a general guideline, university funds, regardless of their source, should not be used to pay for business meals if the only persons involved in these meals are university employees.

Exceptions to this guideline apply to meals provided as part of a working lunch (there must be a written agenda and the meal must be served during normal meal times) or an awards ceremony recognizing an employee or employees for a specific achievement.

Plants, and Flowers

Items purchased for events or occasions (condolences or congratulation for a new baby) and which are determined to be in the best interest of the university may be reimbursed when approved by the appropriate vice president or dean. Efforts should be made to make sure there is only one flower/plant sent per event by the university. Generally, flowers would be sent for bereavments (spouse, parents, or children), extended or serious illness of the employee, addition of a new baby to an employee's immediate family, or wedding of an employee. *Generally, the flowers selected (including delivery) should not exceed \$75.*

Retreat/Team Building/Celebratory Events:

It is recognized that occasionally there is a need to hold employee/team building retreats or celebrations for extraordinary accomplishments. Every effort should be made to hold retreats on campus or at a location that does not add cost. When hosting a retreat, employees should be sensitive to the limited budgets and keep the costs to a minimum. Retreats/team building should be limited to once a year maximum. Meals should only be provided if integral to the business meeting. These expenses should be approved by a dean or VP prior to scheduling. Celebratory gatherings supported with university funds should be a infrequent, and modest in scope.

University Clothing/Apparel: If apparel is required to be worn for university-related business the apparel will be furnished by the university. (admission/recruiting staff, physical plant, security, etc.)