

## **Procedures and Guidelines for Special Expense Requests (updated 7-12-2013)**

### General categories for which approval for special expenses are required:

- Food purchases (Please refer to Special Expense Guidelines for Common Purchases)
- Giveaways, door prizes, incentives
- Clothing/uniforms
- Excessive expenses (example: meals exceeding normal travel thresholds)

### Procedures for special expense request and reimbursement requests:

- If in doubt as to whether or not you need preapproval, please submit the special expense request form.
- A special expense request form normally needs to be submitted at least one week in advance of the event. Late submissions may be grounds for denying the request and must include an explanation of the late submission.
- Items are not to be ordered until the special expense is approved. If items are ordered prior to approval, the person who did the ordering may be personally liable for the expense.
  - Approved special expense requests should be:
    - Forwarded to the purchasing office if they pertain to a purchase order
    - Attached to your monthly transaction log if the purchase was made using your p-card
    - Attached to your employee expense report if you paid with personal funds
- The following have delegation to sign under “Agency Approval” :

For BSU: Vice President for Student Development and Enrollment  
Dean of Each College for Academic Affairs  
Associate Vice President for Academic Affairs  
The President  
Vice President for Finance and Administration

For NTC: The President, Provost and Vice President for Finance and Administration

### Special Expenses that would generally be approved:

- Refreshments or meals that are part of a meeting with citizens; members of boards, commissions, task forces, or workgroups; foreign, federal, state, or local governmental officials and/or employees.
- Meetings that are composed primarily of individuals who are not BSU/NTC employees (e.g. commencement meals, receptions for speakers or performers).
- University or College meetings held annually or each semester during start-up.
- System-wide training sessions, held on campus, with an external party conducting the training.
- Refreshments for the Center for Professional Development meetings or other campus-wide organizations, when the meetings deal with important issues that have campus-wide significance. Generally, these meetings would need to be at least two hours long to meet the criteria in the MnSCU procedure for special expenses.
- Departmental retreats or other non-routine meetings that generally are two hours long or longer, and deal with long-range planning or other substantive issues that will have departmental or campus-wide significance, funded through a departmental account.
- Survey incentives for students.
- One meal for up to four members of faculty or administrator search committees who are meeting with a candidate, at a reasonable cost, but in no case to exceed twice the standard reimbursement rate.

### Special Expenses that likely would not be approved:

- Requests for refreshments submitted after the event has taken place.

### Special expenses that are specifically not allowed:

- Refreshments or meals for routine staff meetings (e.g. weekly or monthly departmental meetings).
- Employee parties (including holiday parties).
- Requests for serving alcohol.

Note: These guidelines do not apply to funding requests from Foundation accounts. Those accounts follow Foundation rules and designations associated with the particular account, and some expenses not allowed by MnSCU policy may be acceptable expenses from some Foundation accounts.