

Indiana University Southeast

Special Expense/Hospitality Request Form

Background

Most of the funding for hospitality is provided directly from departmental budgets and transferred to the centrally managed special expense account. There is a small amount of campus base funding for special expense to provide annual support for high priority campus programs and ceremonies. The zero based budgeting approach will apply to all special expense requests either funded by the campus or a department. Funding for special expense programs from student activity fee funded accounts, self-funded 20 and 23 accounts when spending for promotional expenses, and auxiliaries or grant accounts are not subject to this review process (though all programs must still comply with the special expense policy).

The campus is still subject to university guidelines on establishing the overall campus budget for special expense. We anticipate that not all requests can be approved given the university's policy on budgeting for special expense activities.

Please take time to review the policy called Allowable Hospitality Policy I-50 which is located at [Allowable Hospitality Expenses](#).

Allowable special expenses are: recruitment of students, faculty or staff, official ceremonial functions, receptions for students, employee recognition events, refreshments for training events provided by HR or ILTE, etc.

Unallowable special expenses are: alcoholic beverages, flowers, any charitable donations, gifts, fundraising expenses, meals and refreshments for employees (except as noted above).

The above lists are not all inclusive but representative of allowable and unallowable expenses.

Instructions

1. Use a separate form for each program or activity you are requesting special expense approval or funding.
2. Indicate the funding source (from your own budget or the central special expense account).
3. Ensure your request complies with the policy. Requests that do not comply with the policy will not be considered. You can check with Melissa Hill or Ashley McKay for clarification.
4. Rank order all requests if submitting multiple requests.
5. Save this form to your PC and fill out. You will be given access to an Oncourse site titled "FY 2015 Budget Const". Here you will "upload" your requests in the folder titled with your name located under "Resources" and "Budget Folders and Worksheets". Please save the file name as the title of your request. If you do not have access to the Oncourse site, please e-mail Melissa Hill mhill02@ius.edu.

The purpose of this request process during the budget construction process is strictly done so that the campus can evaluate against the ceiling required by IU Policy.

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Fiscal Year	Current Date	Name of Event or Activity

Requested by:

Name	Extension	Department	Org Code

Please choose the type of Hospitality expense that relates to your event:

- Expenses related to the individual recruitment of faculty, staff or students, including search and screen committee activities.
- Official ceremonial functions of the university (such as commencement)
- Receptions for which the primary purpose is the attendance and benefit of a group of students or potential students
- Official business of the Board of Trustees
- Employee recognition receptions (service anniversaries, retirements)
- Refreshments for training sessions when training is provided by campus Human Resources, campus faculty development offices, or is facilitated by an external training consultant
- Meal (but not entertainment) expense for employees and outside reviewers required for accreditation activities and peer or administrative reviews
- Meals for individuals invited as visitors to contribute to the intellectual life of the university community. Normally such visitors will deliver a seminar, colloquium talk, or other lecture or performance for the benefit of Indiana University faculty and/or students
- Meals or refreshments for formally organized departmental or organizational employee business meetings. This does not permit lunch only meetings. To qualify, a meeting must be of at least one-half day duration.

Please describe how the event relates to the event type chosen above:

Please provide a description of the event and meals/refreshments required:

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Who are the intended audience and how many are expected?

Please provide a statement indicating the relevance of the event and expected benefits to be derived which will serve the best interest of the University.

What is the budget for this event?

\$

Is this a new event? Yes No

If run in the past, how was the event paid for?

Campus Funding Foundation Sponsorship via external agency Student Activity Fee

Department Account If department account, please provide account number:

Please check one of the options below.

I am requesting approval to hold this event and plan to pay for it with my department's funds.

I am requesting approval to hold this event and it be paid for out of central special expense funding.