

EXPENDITURES EXCEEDING \$100
Entertainment Management Form
Dedman College

Department _____

Single Event Repeated Event / frequency _____

Budget to charge: _____ Amount _____
org name estimate

Date of Event: _____ On Campus / Off Campus _____
location

Names of attendees:

Event purpose: _____

Event description:

Requester: _____
signature

Date _____

Dean's Approval: _____
signature

Date _____

Comments:

This form needs to be returned to Brooke Guelker at bguelker@mail.smu.edu **five days** before the event, lunch, or dinner that costs more than \$100.

Business Meals

No more than three University employees should accompany each guest of the University to a business meal unless there is a legitimate business reason that is approved by the President, vice-president, dean, athletic director or designee. When a spouse attends a business meal, it is at the employee's expense unless guests' spouses are present. Any exception to this requirement must be based upon a bona fide business reason and be approved by the next higher authority (i.e., a dean, vice president, the athletic director, or the President). In no case may a host approve his/her spouse's expenses. Reimbursement for business meals is subject to the documentation requirements outlined in Section E of this policy as well as any further limits or requirements imposed by the department, school, or area.

Off Campus Entertainment Events

Alcohol Policy, if appropriate. Generally, entertainment events should be held on campus unless there is a business reason for holding them at some other location. Reasons entertainment events may occur off-campus include location of the guest(s), availability of University resources, and appropriateness of University resources. Off campus entertainment events must be approved by the President, vice-president, athletic director or dean except in the case of fundraising, community relations, and faculty, staff and student recruitment. Payments to service providers (including, but not limited to, caterers, musicians, bartenders and parking attendants) should be made directly by the University to ensure the appropriate tax treatment.

Entertainment: Fund raising, Community relations, Faculty, Staff, Student recruitment

Entertainment events for fundraising, community relations, and faculty, staff and student recruitment, may be paid from University funds. The University will not pay for more than three University representatives for each guest unless there is a business reason approved by the President, vice president, athletic director or dean. Reimbursement for spouses at such events is appropriate only if guests' spouses are present, unless the next higher authority (i.e., a dean, a vice president, the athletic director, or the President) has granted an exception based upon a bona fide business reason. In no case may a host approve his/her own spouse's expenses.

Awards, Banquets, Holiday & Social Celebrations

Awards banquets and holiday and social celebrations may be paid from University funds if the celebration is primarily for students or is for the entire University community and is approved by the authorized parties. Office social events and celebrations for select groups of faculty and staff may not be paid from University funds unless an exception to policy is authorized by the President or vice-president.

Decorations, Floral arrangements & Greeting Cards

Use of University funds to pay for decorations, floral arrangements and greeting cards for holiday occasions, sympathy, and celebration of birthdays, births, graduation and other accomplishments is not permitted except as described in University Policy 12.5.

Internal charges

Internal charges (cross charges) must include all the elements above. Individuals or departments arranging events or business meals must provide all the required elements for documentation in E.2) through E.5) to the charging department. The original documentation will be retained by the charging department, including detailed support for the charges.

Pony Express and Procurement Cards

Employees who have been provided Pony Express cards to be used for business entertainment must document the business use of the cards as described in E.2) through E.5), above. Detailed support for the business purposes of their meals used must be submitted with requests to replenish credit on their cards.

This form needs to be returned to Brooke Guelker at bguelker@mail.smu.edu **five days** before the event, lunch, or dinner that costs more than \$100.