

April 9, 2008

To: ME Faculty and Staff
From: Pam Wilson
Subject: Clarification on University Hospitality Policy Reimbursements

This communication establishes the criteria for reimbursement of hospitality expenses within Mechanical Engineering.

The current University hospitality policy states that all hospitality and special expenses documentation must include the following information:

- Business purpose of the expense, benefit gained or expected to be gained
- Location and date of expense
- Names of attendees and their business relationship to you or the University (alumni, donor, occupation or their titles)
- For entertainment, the nature of the business discussion or activity that occurred immediately before or after the entertainment must be documented.

The policy also states that \$75 per person is the maximum amount allowed for hospitality meals. This includes the beverages, tax, and gratuity on the bill. If you know you will need to spend more than this \$75 limit, it will be necessary to get prior approval from me. University policy link below:

http://www.policy.umn.edu/groups/ppd/documents/appendix/hosp_supp.cfm

For groups less than or equal to 15 people, I expect you to provide the actual names of the attendees. In addition, you will need to include their business relationship along with the other required information listed above.

If your group is larger than 15 people, a list of who was invited to attend or a summary list of who attended along with their business relationship to the University will suffice. For example, if you entertained a group of 50 people for a meal, you could state the following: 20 were undergraduate students, 10 were graduate students, and 20 were alumni. Also, you must then state the business relationship, purpose of the meeting, etc.

Whether you are using a purchasing card or seeking reimbursement, we will need this information. The document will not be processed without it. This procedure takes effect immediately.

If you have any questions, please contact me. Thank you, in advance, for your adherence to this procedure.