



Hospitality and Entertainment Pre-Approval Form

Event Name: _____	ORG Code: _____
Date(s): _____	Faculty/Dept: _____
Location: _____	Event Time: _____
Funding _____	Number of People: _____
Source(s): _____	
Overview: _____	

ESTIMATED EXPENSES	\$ Amount		# of Events	\$ Total
		X		
		X		
		X		
		X		
		X		
TOTAL ESTIMATED COST				

ACTUAL

Submitted By	Signature: _____
Name: _____	Date: _____
Dean/Director/Executive Director	Signature: _____
Name: _____	Date: _____
Vice President/President (if required, per procedures)	Signature: _____
Name: _____	Date: _____

Notes:

This form must be completed and forwarded for approval at least 2 weeks in advance.

Approval must be in place before any related expenditures can be made.

A signed copy of this form should also accompany related P-Card reconciliation and Expense Reports.

FM5 Business and Travel Expense Procedure

Hospitality or hosting: The provision of food and beverages for social or recreational activities, events and functions in support of the educational, research or service activities of the University.

E. Hospitality expenses

1. Hospitality and entertainment charges incurred in support of the University's mission will be paid by the University provided the expenses are authorized, reasonable and appropriately documented.

- a. Pre-approval is required for all hospitality expenses by the administrator or designate responsible for the department/division hosting the function; or, if the administrator is also in attendance, by the appropriate higher-level administrator (one-over-one approval).
- b. Refreshments and meals during meetings involving only University employees are not normally considered a customary business expense. Exceptions must be pre-approved by the Dean or Director.
- c. Maximum normal amount per person per event is provided in [Appendix 1](#). Exceptions require the approval of the VP, Finance and Administration.
- d. External sponsors, departments and faculties may have additional restrictions on hospitality activities.
- e. Purchase of alcohol, including when hosting external clients, will not be paid for by the University unless pre-approved by the Vice President, Finance and Administration, and, for on-campus events, also approved by the B.C. Liquor Control and Licensing Branch.
- f. On-campus food service providers must be utilized for any on-campus business meetings. Exceptions are allowed when the on-campus providers are not able to meet the catering requirements.

2. Departmental Social Functions

- a. Employee social functions may generally be held by departments/divisions during the year outside of any university-wide social events (some of which are addressed in Policy G.5).
- b. Minimal impact on operational services of the University and fiscally responsible utilization of University resources should be ensured by the organizers of such events.
- c. Maximum normal amount per person per event is provided in [Appendix 1](#), Table 2.
- d. Prior approval for such functions must be obtained by the area Vice President and sanctioned at the discretion of the administrator or designate responsible for the department/division.
- e. Employees are encouraged to voluntarily fund, or contribute to, and organize departmental social functions.

July 22, 2015

Colleagues,

I would like to begin by thanking all of you, budget managers especially, for helping KPU to achieve an operating surplus in fiscal 2014/15. Your assistance in curtailing all non-essential spending was crucial to our success.

As we are currently in a new fiscal year and many of you are beginning to plan your Fall and Winter events, we would like to outline the following policies:

- As per KPU's Business and Travel Policy, each Faculty/Business Unit may spend **up to** \$25/person from their operating budget for social events in a fiscal year. The \$25/person will be applicable to all faculty, staff and administration in a Faculty/Business Unit at the beginning of the 2015/16 fiscal year. Once the \$25/person, or the Faculty/Business Unit maximum approved budget, has been spent, a Faculty/Business Unit may no longer host a social function from their operating budget. If a Faculty or Business unit has not specifically budgeted for social events, these events must be covered by existing budget funds. No additional funds will be allocated for this purpose.

A Faculty/Business Unit may choose to spend the \$25/person on one event, or spread over multiple functions and will need to coordinate with internal departments on how funds will be spent.

They may choose to hold:

- One annual event using up the full \$25/person amount
- Numerous smaller events throughout the year totaling to the \$25/person amount
- Other combination of the above

Holiday Socials

- KPU's Campus Principals will be responsible for organizing a holiday social at their respective campus. They will be allocated a budget which they can spend according to KPU's Business and Travel Policy.

In an effort to ensure that KPU has a surplus at the end of this fiscal, we are taking a close look at food and beverage spending which makes up a large percent of KPU's budget. The funds provided in a given year are intended to be used in the current fiscal year therefore any unused operating funds will not rollover into the next fiscal year.

Clarification around retirement parties going forward will be sent shortly. Please do not include retirement parties in your current social event plans.

Going forward, please familiarize yourself with KPU's Business and Travel Policy and Procedures.

A reminder also that pre-approval is required for all travel and hospitality expenses.

Thank you,
Alan Davis, PhD
President and Vice Chancellor