

IUB Standard Operating Procedures

Subject: Hospitality Policy

Source: OBAP (Office of Budgetary Administration and Planning)

Date Issued: March 21 2018

Date of Last

Revision: March 21, 2018

SOP Number: 1.0

Rationale: To aid fiscal officers in understanding and applying the campus hospitality standard operating procedure (SOP) relative to the university policy (see Cross-References section).

SOP: In the past, the campus has approved all hospitality requests for events, meetings, pizza, etc. Note: The approval process for alcohol is a separate policy. Effective March 21, 2018 the campus no longer requires campus pre-approvals for hospitality requests under \$2,500. However, this does not negate adherence to the university hospitality expenditures policy regarding appropriateness and allowable expenses.

With this change, the RC (Responsibility Center) will be responsible for ensuring the propriety and reasonableness of the hospitality expenditures for adherence to the university policy and not solely the guidelines of this campus SOP.

The provost, deans, and vice-provosts can establish their own processes and set their own thresholds for hospitality expenditures.

There is some concern from units as current hospitality requests are coming to the campus administration and not to the RC level. Without the campus review, units would like to have some method to review.

The campus is collaborating with the IU Foundation on the campus pre-approval requirement before distributing funds related to both hospitality and alcohol. There is work occurring with the change at the university level where some units are both BL and UA. IUPUI is not requiring pre-approvals and IUB will gradually move towards this same path.

Consider this SOP the “soft opening of the policy” as OBAP works through unit needs. If requests come in, the campus will continue to approve during this interim period.

Cross References:

Financial Management Services, “Hospitality Expenditures,” [FIN-ACC-50](#)
[Purchasing Hospitality reference](#)

Financial Management Services, “Role of Fiscal Officer, Account Manager and Account Supervisor,” [FIN-ACC-1](#)
[Indiana Sales Tax Matrix](#)

Responsible

Organization:

Office of Budgetary Administration and Planning, Financial Management Services