Minnesota State University Mankato

Request to Incur Special Expenses

Prior Approval Required - All Funding Sources

CS1407

Definition**: Special expenses are expenses incurred in connection with work-related responsibilities or official functions not generally supported with public funds. Special expenses are further defined in MNSCU board procedure 5.20.1.* ***Special expense payments may be made only if a "Request to Incur Special Expenses" is approved and attached to the payment/reimbursement document.

***Policy:** Except in emergency situations, approval is required before any special expense is incurred and before commitments involving special expense are made. Requests received after the event or too late to provide a proper review must include an explanation why the request was not provided in a timely manner.*

Employee Name or Group _____ Mail Code_____ Phone #_____

Requesting Department _____ Mail Code_____ Phone #_____

Expenses Not Covered: Refreshments or meals for routine staff meetings; private club memberships; alcoholic beverages; entertainment; employee parties (including holiday parties) and weapons of any kind.

Approval is requested for the following: (check all that apply and circle the applicable number)

A. Special Expense: MnSCU Board Policy (see next page for corresponding numbers as indicated below):

- ☐ Food/meals/non-alcoholic refreshments (when not in travel status): **1, 2, 4, 5 ,6a, 6b, 6c, 6d, 6e, 7, 10, 11b, 12b**
- ☐ Registration and tuition fees over $1,000 per participant: **3**
- ☐ Lodging when not in travel status: **9a, 9b, 9c**
- ☐ Non-cash/non-negotiable items of nominal value: **12a**
- ☐ Contract with a speaker, facilitator or performer: **8**

B. ☐ Other Expense Justifications providing further documentation or clarification

Full name of conference, meeting, organization, event, etc.	Location of event	Date(s) & Times of event

Explain in detail the business purpose and how it benefits your unit/department (use additional sheet if necessary).

Funding source: Cost Center account# (s)_____ $ Amt _____

_____ $ Amt _____

Payment method (check all that apply)	**Estimated Amount**	**Description**
☐ PO# _____ or CA035# _____	_____	_____
☐ Purchasing Card	_____	_____
☐ Emp Exp report	_____	_____

List the anticipated number of attendees from the following groups:

State employees _____; non-state employees _____; students/grad assts _____

Department Approvals

I certify I have read the MNSCU board procedure 5.20.1 regarding special expenses and confirm the above expenses comply with this policy.

Requestor Name (print)	Signature	Phone	Date
Department Chair/Unit director (print)	Signature	Phone	Date
Dean/VP (print)	Signature	Phone	Date

Approved for amount not to Exceed:

$_____

Not Approved Because:

Distribution: Upon completion of approvals, return the original form to requestor.
Requestor attach copy of approved form to all payment requests.

The following expenses are covered where the benefits of the employee's attendance or participation will accrue primarily to the state:

1. Full cost of a meal when it is part of the structured agenda of a conference, workshop, seminar, or meeting which the chancellor or president has authorized the employee to attend, whether or not the employee is in travel status.
2. Meals and related expenses, or non-alcoholic refreshments and food served when conducting business with citizens; members of boards, commissions, task forces, or workgroups; foreign, federal, state, or local governmental officials and/or employees.
3. Registration and tuition fees for conferences, seminars, workshops, or education courses. Education courses provided through a tuition waiver are not special expenses. Prior approval is required only if the cost exceeds $1,000 per participant.
4. Non-alcoholic refreshments and food for system, board, college or university sponsored meetings, receptions for speakers, performers, and commencements; conferences; workshops; and other similar system, board, college or university sponsored meetings or activities that have predominantly non-state employees.
5. Non-alcoholic refreshments, food and other conference costs for system, board, college or university sponsored events where registration fees are charged and the majority of the participants are non-state employees.
6. Non-alcoholic refreshments and food for meetings that consist primarily of state employees when the non-alcoholic refreshments and/food are an integral part of the event and are necessary to sustain the flow of the meeting and to retain captive audience and meet one of the following criteria:
    a.) a meeting with participants from many geographic locations where the majority of the participants are in travel status
    b.) a department-wide or division-wide annual/quarter/semester staff meeting for all employees
    c.) a department or division senior management planning or organizational meeting
    d.) a department, division, college, university, system or office of the chancellor wide meeting regarding a topic(s) with department, division, college, university, system or office of the chancellor wide impact
    e.) a structured training session, available to employees generally and conducted by persons outside the Minnesota State College and University System, provided it has been approved by the college, university or office of the chancellor.

    With the exception of Board of Trustees meetings, campus visits, and other official functions, including but not limited to committee meetings, the above meetings shall be scheduled to minimize the inclusion of meals.
7. Non-alcoholic refreshments and food may be provided during official meetings or other functions of the Board of Trustees.
8. Contract with a speaker, facilitator or performer that is part of an officially sanctioned conference, workshop, development session, commencement, or other event sponsored by a college, university, Office of the Chancellor, or Board of Trustees.
9. Lodging if an employee is not in travel status:
    a.) when weather conditions or other unforeseen occurrences warrant lodging;
    b.) when college, university or office of the chancellor business or contract negotiations prevent the employee from returning home; or
    c.) when the chancellor or president authorized overnight participation in an approved event. Authorization should be based on the benefit of such participation to the Minnesota State Colleges and Universities.
10. Expense reimbursement for lodging, travel, and meals for one attendant for an employee with a disability that requires daily assistance in performing various personal tasks or who has special mobility needs.
11. Expenses as follows for employees assigned to work at the State Fair:
    a.) Fees and admission to the fairgrounds;
    b.) One meal during each shift of fewer than ten hours or two meals during each shift of ten hours or more, subject to the meal allowances for in-state travel collective bargaining agreements or compensation plans;
    c.) Taxi fare for employees with a disability who are unable to drive or use other means of public transportation between their normal work station and the fairgrounds.
12. Expenses as follow for individual employee and board member awards and system, board, college, and university recognition events:
    a.) Awards for individual or group achievements, which are limited to non-cash/non-negotiable items of nominal value as, provided for under IRS guidelines. Items of nominal value are those that have no market or retail value such as promotional or advertising items.
    b.) Up to 100% food and non-alcoholic refreshment reimbursement for employees being recognized at annual employee recognition events. Reimbursement for travel in accordance with System Procedure 5.19.3. Reimbursement for alcoholic beverages is prohibited.

A member of the Minnesota State Colleges and Universities System. Minnesota State University, Mankato is an Affirmative Action/Equal Opportunity University.
This document is available in alternative formats to individuals with disabilities by calling Business Services at 507-389-5069 (V), 800-627-3529 or 711 (MRS/TTY).