iSchool Expenditure Guidelines

iSchool employees will follow all university expenditure policies as noted in the following links. See last page for things to avoid.

http://supolicies.syr.edu/admin/petty_cash.htm
http://supolicies.syr.edu/admin/expenditure.htm
http://supolicies.syr.edu/admin/expenses.htm
http://supolicies.syr.edu/admin/catering.htm
http://supolicies.syr.edu/emp_ben/gift_disbursements_emp.htm
http://supolicies.syr.edu/emp_ben/gift_disbursements_students.htm
http://supolicies.syr.edu/admin/procure.htm
http://supolicies.syr.edu/admin/sales_tax.htm
http://supolicies.syr.edu/admin/travel_card.htm

In addition to the above policies, the following school policies will be followed.

General purchasing guidelines:
As a general rule, the purchase of office supplies, printing, catering, books and publications, membership fees, contracts for rentals, and gifts will be coordinated through the school's Budget Office. This will assure that purchases are made through university approved vendors with whom pricing has been negotiated and will also assure compliance with the above noted university policies, including those policies related to obtaining competitive bids for purchases over $10,000 and tax exempt requirements.

Computing Equipment and Software:
The purchase of all computing equipment will be coordinated through our IT Services Office to assure that purchases are made through university approved vendors and to assure that equipment complies with university standards.

Travel:
As a general rule, travel arrangements will be coordinated through the school's Budget Office. This will help to coordinate travel when several people are attending the same event, serve as notification that travel is approved, serve as notification that someone in the school is traveling, and will help comply with university risk management policies and the University's tax exempt status. All staff travel must be approved by supervisory staff before arrangements will be made. Faculty travel must be in accordance with the School's Faculty Travel Policies.

Use of University Credit Cards:
The privilege of holding a University issued credit card does not imply a carte blanche permission to purchase without prior approval. University credit cards issued to iSchool faculty and staff are intended to be used sparingly, mostly when traveling, and are not to be used as a substitute for the general rules

outlined previously or to circumvent university purchasing policies. Purchasing limits for credit card holders are generally set at $1,000 per transaction.

Charges to credit cards must be for legitimate business purposes only. Split charges made to avoid the $1,000 per transaction limit are not allowed and will result in revocation of the card. Items over $1,000 should always be ordered through the school's budget office and should be expensed through a purchase order.   Please plan accordingly to give ample time for orders to be placed and processed. Staff without university credit cards have no authorization to spend university funds without prior approval by the appropriate supervisor.

Catering:
As a general rule, catering for business meetings is not allowed. In special circumstances and with prior approval, catering may be ordered for meetings but will be limited to $10 per attendee. Please see SU Catering policies in the link above. Catering is NOT PERMITTED for class sessions.

Catering for large events should be arranged through University Dining Services to assure that proper food safety measures are in place. Planning should take place well in advance of the event.

Events:
For purposes of these policies, Events are considered to be any occasion where a group gathers for a particular purpose other than a routine business meeting. Examples may include, but not be limited to, receptions, residencies, field trips, extraordinary meetings (e.g. board of advisors, accreditation meetings), career fairs, faculty or staff retreats.

For expenditures related to events a budget shall be prepared and approved by the event organizer's supervisor and the budget office. This will assure that funds are available and that expenses are allocated to the appropriate program. The budget should include information on the nature of the event, the dates, times and locations, transportation, catering, lodging and other categories as may apply.

Capital Purchases:

All capital purchases will be coordinated by the Assistant Dean for Administration or the Assistant Dean for Information Technology. Capital purchases are made for major equipment and building needs. This will assist in compliance with University policies related to obtaining competitive bids for large purchases (required for single purchases over $10,000).

BAD PRACTICES TO AVOID:

DON'T:

- Split credit card charges to circumvent the $1,000 limit
- Use a credit card for routine expenses – plan ahead
- Pay an individual for services using a university credit card or your own cash
- Expense alcohol to a sponsored project
- Purchase personal items on a university credit card
- Throw away any Receipts
- Lose the detailed receipt for meals (including names of attendees)
- Pay Sales Tax
- Travel without permission and then expect reimbursement
- Request last minute purchases – plan in advance
- Absolutely don't turn in receipts more than 75 days after the expense