

Guidelines for Reimbursement of Expenses for Seasonal/Holiday Events Using OU Foundation Funds

The University of Oklahoma Foundation's Guidelines for Reimbursement of Expenses for Seasonal/Holiday Events is as follows with the proposed revision marked in bold and underlined.

5.6 Seasonal/Holiday Events

Seasonal/holiday events that promote institutional business may be reimbursed from Foundation accounts subject to the following guidelines:

- a) Such events must include a large portion of students, donors, and friends of the University. The business purpose should be recognition of such individuals whose support is critical to the mission of the University.
- b) All payment requests must be reviewed and co-signed by the Provost or appropriate University Vice-President.
- c) Funds used must be unrestricted.
- d) Expenses should not exceed \$1,500 or \$15 per person, whichever is greater.

**UNIVERSITY OF OKLAHOMA NORMAN CAMPUS
SEASONAL/HOLIDAY EVENT EXPENSE CERTIFICATION FORM**

- 1) Complete this form and obtain signatures from the appropriate Chair/Director and Dean (for school or departmental events)
- 2) Forward the form to Lizi Young in the Office of the Senior Vice President and Provost with **all** the Foundation Reimbursement requests involving the event attached.
- 3) After the Provost reviews and co-signs, the forms will be forwarded to the OU Foundation.

PURPOSE OF THE EVENT:

DATE OF EVENT _____ **PLACE OF EVENT** _____

ATTACH A LIST OF INVITED ATTENDEES -- Include their affiliation with the University (i.e., faculty, staff, student, donor, friend of the University).

LIST BELOW ALL EXPENSES THAT ARE BEING REIMBURSED BY THE OU FOUNDATION

Amount	Payee	Payment is for: (i.e., food, music, facility rental etc.)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

_____ **Total Expenses to be reimbursed by OU Foundation (*not to exceed \$1,500 or \$15 per person, whichever is greater*)**

_____ **Number of Attendees**

_____ **Expense divided by Number of Guests**

APPROVAL/CERTIFICATION:

I certify this expense is authorized and incurred under the provisions of the guidelines governing holiday events.

Reviewed and Approved:

Signature of Account Sponsor

Date

Department Chair/Director

Date

Dean

Date

Senior Vice President and Provost

Date

[illegible]