

Ohio University College of Business Spending Policies

Travel

The purpose of travel is to enhance the student experience by direct experience or through professional development of the College of Business Faculty and Staff.

All proposed travel must demonstrate a clear connection to the CoB mission, be pre-approved by the college (CoBServices.com) and submitted 45 days before the proposed date of departure.

Ohio University travel policies must be followed.

Student Travel must be preapproved. Requests must be submitted by the student advisor or the Faculty or Staff member responsible for the trip. Submissions include the names of all students, Faculty and/or Staff.

- One CoB Faculty or staff member may accompany up to 10 students.
- Two Faculty or Staff members are required for groups over 10.

Professional Development – Travel must support the mission of the CoB and approved as important to that mission by the Chair or direct supervisor and the COO.

Individual Faculty and Staff are allotted a maximum dollar amount for travel each year. Funds may only be used for preapproved travel, publication fees, or professional membership dues. Funds are nontransferable and do not carry forward. Multiple staff members may not attend the same conference without prior approval.

Group I:	up to \$2,000
Group II:	up to \$1,200
Staff:	up to \$1,000

Mileage reimbursement is according to university policy. In most cases mileage will only be reimbursed for one vehicle per trip.

Hotels are to be reserved for individuals or groups according to university policy.

Seat upgrades are generally disallowed. Please see university policy and note that maximum travel allowance may not be exceeded regardless of upgrades, baggage fees, etc.

Contracts, Partnerships, MOUs

All agreements must be approved by the Dean or COO who will have them vetted by either OU legal or procurement as required by OU policy. University approval can take up to 30 days or more in some cases.

New Program Proposals

Ideas for new programs and activities (i.e. GCP sites, new student experiences, etc.) must be submitted through CoB Services and receive approval from college leadership before they are developed. The link can be found at COBServices.com under “All Forms” “traveling”
https://ohio.qualtrics.com/jfe/form/SV_39mlNkw0WU9AW3P

Events and Entertaining

All events must be approved through CoB Services 30 to 45 days in advance depending on the event. Large recurring events must be planned a year in advance. When Event Services participates in the organization of an event, they will set the parameters of the event in consultation with the faculty or staff member responsible for the event.

Food and Coffee services are generally reserved only for events with outside participants who add value to the CoB Mission. Pre-approval is required.

Departmental meetings and retreats should be scheduled outside of meal times. Coffee and beverage service for one Spring and one Fall meeting is allowable with prior approval.

Alcohol is not considered a necessary part of business meetings and must be approved in advance of purchase. Alcohol may only be purchased on a foundation account. There is a two-drink per person maximum on alcohol purchases.

Family – spouse, significant other, children are welcome to attend CoB events when invited.

- At other CoB events, approval to bring a guest or guests is required in advance and a clear business purpose must be substantiated per university policy if CoB funds are requested.

Interviewing must be in accordance to university policy. Meals must be approved and serve a clear business purpose. The number of attendees should be reasonable and unduplicated.

Advisory Boards should have the goal of becoming self-sustaining.

Supplies

Basic office supplies are available in the Business Services office located in 609 Copeland Hall. Stockpiling of office supplies outside of Business Services is prohibited.

All additional office or teaching supplies – bulk or specialty items – must be requested through COBServices.com. Requests must be made and approved a minimum of two weeks in advance.

Gifts

Gifts for faculty and staff using CoB funds are prohibited under Ohio Law.

Gifts for unpaid speakers are allowed with approval and will be in the form of three levels of gift bags. An account number and the name of the recipient must be provided when requesting a gift bag.

Student gifts are generally not allowed. Student gifts totaling \$65 for the year must be reported as income. Gift items related to specific programs with specialized fees are allowed within reason and with preapproval.

Gifts for life events using university funds are generally disallowed by university policy.

Marketing

The purchase of marketing services or materials must be pre-approved by the Director of Marketing and in some cases, also by the COO.

Links

Affordability and Efficiency Act – <https://www.ohio.edu/finance/purchasing/affordability-and-efficiency>

OU Travel – <https://www.ohio.edu/finance/purchasing/travel>