

College of Agriculture and MAES Hospitality Approval Form Best Practices

Form Overview

- General Notes from Business Procedures Manual
 - Hospitality Approval Forms must be completed **prior** to the expenditures and event.
 - Expenditures under \$50 do not need a Hospitality Approval Form, but do need a business purpose
 - The event host cannot approve the form (e.g. a Department Head cannot be listed as host because their signature is required)

- Event Details:
 - Function/Event Title: Should include a business purpose that can be easily understood and aligns with MSU/COA/MAES missions.
 - E.g. Student Study Session snacks (with flyer included) is appropriate vs. Lab Meeting (with no agenda) is not appropriate
 - Request: Indicate how many days of lunches, dinners, snacks, etc. will be needed
 - Amount Requested:
 - Suggested maximum per person, per meal:
 - Breakfast: \$25
 - Lunch: \$25
 - Dinner: \$35
 - If you are planning to exceed the above amounts in your request, a justification must be provided as an attachment. Note: faculty recruitment and use of catering are justifications.
 - Any expenses that exceed your requested amount are not approved, and should only be made in extreme circumstances. A new form must be approved prior to submitting expenses.
 - This should also include tip, which cannot exceed 20% of the meal costs
 - Review receipts for auto-gratuity
 - Alcohol cannot be on a P-card; purchase on a personal card and submit for reimbursement on a pre-approved Foundation account
 - Alcohol should not be present at events focused on students

- Hospitality Category
 - The category of the expense should be aligned with the core purpose of the meeting/event necessitating sustenance.
 - The College of Agriculture and MAES, as an academic and research unit, respectively, will almost never have an event that is categorized as entertainment. Account codes such as Education/Research Training Expenses, Job Candidate Expense, and Program/Education/Training Expense will be the most commonly used.

- Participant Details
 - Private events/meetings
 - Require a participant list and an agenda.
 - If you do not know who is attending when submitting, list the expected participants and update when submitting expenses.
 - Event open to the public
 - Require a flyer or program documentation

Approval Signatures by Index Type:

Updated 1/2025 EW

EXTENSION - 0s	412, 423, 432, 433, 434	4W	436, 437, 438	9s (MAES)
1. Requestor 2. Department Head 3. Carrie Ashe 4. Emily Williams	1. Requestor 2. Department Head 3. Emily Williams	1. Requestor 2. Department Head 3. Emily Williams 4. OSP (relevant fiscal manager)	1. Requestor 2. Department Head 3. Emily Williams 4. Tawnya Morgan	1. Requestor 2. Department Head 3. Emily Williams

Use of Indexes

Dean Bajwa would prefer all non-essential work-related hospitality expenditures to be on a Foundation index.

- Academic (412 indexes)
 - To be used for events/meetings that are directly student-related and has a clear academic-related purpose
 - Examples: welcome tent, retention-focused event/activity, food insecurity-related snacks
- Research (911 indexes)
 - To be used for events/meetings that are directly research-related and has a clear research-related purpose
 - Examples: field day, public presentations of research with at least 1 non-MSU participant, work that can only be accomplished during the lunch hour (rationale required)
- Designated (43 and 936 indexes)
 - To be used to support work that generates this income
 - Any academic-related expenditure allowed on 412 funds or research-related expenditure allowed on 911 funds
 - Examples: lab/planning meetings held during lunch (rationale required)
 - Food/snacks may not be purchased on course fees
- F&A Funds (436/7/8 indexes)- See Best Practices for F&A Costs from VPRED
 - Education/Research Training hospitalities may be allowed on F&A funds if the event has a clear research related business purpose.
 - The business purpose must be clear; “lab meeting” for example, would not be a complete business purpose.
 - Team building activities and retreats must have an agenda that shows a learning opportunity which benefits MSU’s research mission.
 - While traveling, if a meeting is held during a meal, the cost of the meal may be allowed (in lieu of per diem) if at least one non-MSU employee is present. Meal expenses should be reasonable.
 - If a multi-day event is on one HAF, a spreadsheet logging all hospitality expenses for that event must be processed.

Additional Resources

- Additional MSU information can be found in the Business Procedures Manual
 - <https://www.montana.edu/policy/business-procedures-manual/expend-campus-hosp-ent.html>
- RED Best Practices for F&A Costs
 - <https://www.montana.edu/research/best-practices.html>
- Information about Land Grant Institutions and their mission
 - <https://agriculture.montana.edu/landgrant.html>