

**NORTH DAKOTA STATE UNIVERSITY FOUNDATION AND ALUMNI ASSOCIATION  
FUND DISBURSEMENT GUIDELINES**

**Purpose of Guidelines**

These guidelines govern the use of funds available to NDSU units in restricted gift funds held at the NDSU Foundation and Alumni Association ("Foundation"). Units are required to follow these guidelines for the

authorization, documentation and payment of expenses incurred on behalf of NDSU ("University").

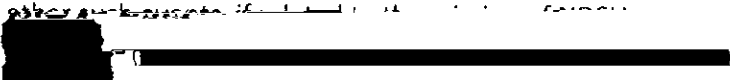
The Foundation and the University have a fiduciary responsibility to donors to ensure that funds are utilized in accordance with the terms and conditions of their gifts ("donor intent"). Donor intent provides

the primary and overriding guidance as to which expenditures are allowable. In addition, the Foundation and University are fully committed to the reasonable and prudent use of resources entrusted to us to



## FUND DISBURSEMENT GUIDELINES

Events that qualify for reimbursement include:

- Donor and outreach events and meetings
  - *Fundraising expenses* that are reimbursed by the Foundation directly through general support gift funds held at the Foundation
- Alumni events and meetings
- Training sessions, professional development workshops, orientations, annual unit socials or other ~~events~~ 

## **NORTH DAKOTA STATE UNIVERSITY FOUNDATION AND ALUMNI ASSOCIATION**

### **FUND DISBURSEMENT GUIDELINES**

#### **Other Expenses**

The following examples of expenses are allowable by the Foundation:

- Flowers to acknowledge significant employee, alumni, or donor life events such as birth of a baby, death of a family member, or hospitalization, not to exceed \$60 plus delivery charges.
- Employee's memberships in various professional and related organizations if the memberships directly benefit the business purpose of NDSU;
- Books, journals, technology, and other such expenses which support the professional development of NDSU employees in their current position;
- Tickets to university-sponsored events if the event is related to the employee's position on campus;
- Other justifiable expenses if approved by the Dean and Provost.

#### **Non-Reimbursable Expenses**

The following examples of expenses are not reimbursable by the Foundation:

- Charges to upgrade seats on airlines and first-class fares
- Charges incurred for missed flights unless extenuating circumstances such as weather, an accident or mechanical problems are documented
- Hotel expenses for travel within 50 miles of NDSU, except in the case of inclement weather
- Mileage reimbursement in excess of the cost of airfare to the same destination
- Meals that are included as part of the registration fee for an event or conference;
- Upgrades on car rentals, GPS rental, and loss-damage waiver fees;
- Personal expenses including passport and visa fees (if not required for business); childcare costs; spa, barber or salon services; purchase of luggage, briefcases, or lap top bags; cell phone accessories, including extra chargers and covers; purchased and rented clothing.

This is not an all-encompassing list but additional scrutiny should be applied to any expense that cannot be paid by NDSU directly and for which Foundation reimbursement is sought. This guideline will be reviewed periodically.

NORTH DAKOTA STATE UNIVERSITY FOUNDATION AND ALUMNI ASSOCIATION

FUND DISBURSEMENT GUIDELINES

Approval \_\_\_\_\_

