

**School of Education Administrative Forum**

**Thursday, March 20, 2014**

**Wisconsin Idea Room, 159 Education Building ⚫ 9:30 a.m.**

**Agenda**

* Updates & Announcements   
  + BUCKY Award for going above and beyond   
    (Business Office U-Rah-Rah, Congratulations & Kudos to You!)
  + Critical Compensation Funding & Salary Savings Transfers
  + Budget Request decisions – target date March 31
* Financial Management – Melissa A-L  
  + Business Services End of the Year Deadlines  
    <http://www.bussvc.wisc.edu/acct/YREndTimetable2014.pdf>
* HR and Payroll – Sarah, Staci, Christy  
  + Summer
    - 2/9ths Report Demo
    - Training Sessions for Summer Hiring
  + Criminal Background Check Requests
  + Performance Evaluations for Classified Staff
* Facilities – Jesse  
  + Potential Campus Space Audit
  + Instructional Space Data Available

***If there are any topics that you would like us to cover, or if you have suggestions for special guest or training opportunities that you would like to see at future forums, please let us know.***

## Melissa Amos-Landgraf Associate Dean for Administration (608) 262-4474

Staci Francis Assistant Dean for Human Resources (608) 262-6139

Sarah Gomez Rendon Human Resources Assistant Advanced (608) 262-4079

Christy Moldenhauer Human Resources Assistant Advanced (608) 262-9149

## Toby Schellhase Accountant (608) 262-1765

Beth Walsh   Assistant Dean, Grants & Contracts (608) 263-5559

Jesse Winters Director of Facilities (608) 445-1878

**DID YOU KNOW?**

<http://www.bussvc.wisc.edu/acct/e-Re/FoundationGuidelines.html>

In e-Reimbursement, expenses not payable with University funding may be allocated to UW Foundation accounts. Upon final approval of an expense report that uses both University and UW Foundation funding, the claimant will receive a single payment for the total amount approved.

## Guidelines

The UW Foundation has provided the following guidelines to ensure that claimants incur appropriate expenses. Additional justification may be requested by the UW Foundation in order to determine whether expenses are reasonable and appropriate.

* **Entertainment**
  + **Meals:** Combined meal/wine cost may not exceed $75 per person, including the amount paid with university funds. For UW – Madison's Meal Policy, see [Policy 201.I - Meals](http://www.bussvc.wisc.edu/acct/policy/travel/meals.html).
  + **Wine:** Wine cost may not exceed $40 per bottle.
  + **Alcohol:** Expenses that cannot be processed with university funds. See [UW – Madison's Alcohol Policy](http://www.bussvc.wisc.edu/purch/ppp4.html#alcohol).
  + **Spouses:** Expenses are covered for spouses when in attendance for business reasons (e.g. entertaining the spouse of a recruit/guest speaker).
  + **Departmental Social Events:** Allowable only with explicit donor documentation stating that funds are intended for this purpose.
  + **Hospitality Expenses (e.g. cake for retirement/flowers):** Will be paid only by a community fund or specific gift designated for the purpose of recruitment, retention and morale.
* **Fundraising:** All expenses associated with raising funds for the university.
* **Recognition/Awards**
  + **Gifts for Non-employees:** A gift in lieu of an honorarium may be reimbursed with prior approval from the Divisional Business Office and the UW Foundation.
  + **Recognition Awards for Employees:** Appropriate up to $100.
* **Relocation:** Cost of moving expenses for new employees that cannot be processed with university funds (e.g. spouse/family expenses, house-hunting, second visits). Relocation expenses reimbursed by the UW Foundation may be reported as taxable income for the claimant. For UW – Madison's Relocation Policy, please see [201.N - Relocation](http://www.bussvc.wisc.edu/acct/policy/travel/relocat.html).
* **Travel:** Travel reimbursements exceeding the university maximums that cannot be processed with university funds. See [UW – Madison's Travel Policies](http://www.bussvc.wisc.edu/acct/policy/ppindex.html).

# Inappropriate Use of Foundation Funds

* **Parking Tickets**
* **Gift cards, gift certificates and cash awards for employees**
* **Donations or memorials to other organizations, including non-profits/tax-exempt charities**
* **Retirement gifts**