

# Oklahoma State University Policy and Procedures

**Professional Development/Retreats**

**1-1204  
GENERAL UNIVERSITY  
March 1998**

## PURPOSE

Oklahoma State University (OSU) recognizes the need for employee training. OSU further recognizes that such training often occurs in a retreat/conference format. To facilitate the participation of employees in such training, while recognizing the need for prudent fiscal responsibility, the following guidelines are to be followed whenever OSU employees are involved in a campus sponsored retreat/conference.

## PROCEDURES

### Introduction

1.01 Vice presidential approval is required. If a vice president is the sponsor of the retreat, then executive vice presidential approval is required. If the executive vice president is the sponsor of the retreat, then presidential approval is required.

1.02 Prior to establishing a retreat account, the sponsor must prepare a memorandum and submit it for approval by the appropriate vice president (or the president when required). The memorandum must, at a minimum, contain purpose (must be training related and applicable to the employees' work and the University's mission), a detailed line item budget, and a listing of employees who will attend.

1.03 After the memorandum and budget have been approved, the requesting department may, at their election, request a retreat account through the normal divisional channels. The type of account established will be determined, to a certain extent, by the source of funds for the retreat. Any residual balance, positive or negative, will be returned to the source account upon completion of the retreat. If the department elects to operate the retreat from an existing account, copies of the approved budget and memorandum should accompany all payment vouchers.

1.04 If the request is approved, expenditures will be processed within the approved budget categories. As it is anticipated that 100% of such retreat/conference activity will be audited, prudence is encouraged. Under no circumstances will alcoholic beverages be included in a budget request. If alcoholic beverages are inadvertently included and approved, such expenses will not be paid from any institutional funds.

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