
RETREATS

Purpose:

To establish a policy and procedures for student and employee retreats.

Additional Reference:

State of Idaho Travel Policies and Procedures
OMB Circular A-21 – Cost Principles for Educational Institutions

Scope:

Applies to all student and employee retreats.

Responsible Party:

Vice President for Finance and Administration, 426-1200

Definitions:

Alcoholic beverages – beer, wine or any beverage containing distilled spirits.

Meal – a catered or restaurant provided breakfast, lunch, or dinner for which employees, students, or other individuals are present for the purpose of conducting substantial and bona fide University business.

Refreshments – coffee and other beverages, snacks, hors d'oeuvres, pastries, cookies, crackers, chips, fruit, etc.

Retreats – retreats typically involve all-day work or training sessions held off campus for the purpose of strategic or operational planning or for faculty, staff or student development. Amusement, recreational or social activities do not qualify as retreats subject to certain exceptions within this policy.

Self-Support instructional program – academic programs supported almost exclusively by participant fees.

Staff meetings – meetings of faculty, staff or student employees that are typically short in duration with an agenda of current issues.

POLICY

I. Policy Statement

Boise State University recognizes the importance of conducting retreats to develop strategic plans or conduct training and

development events for faculty, staff, and student employees. However, employees must be cognizant of budget constraints, appearances and controlling rules and regulations when spending university funds on retreats. Retreat objectives must be clearly defined, the relevance of the retreat clearly demonstrated, and all expenditures must be necessary to meet Boise State University's mission and objectives.

II. Retreat Criteria

- A. Retreats typically involve all-day work or training sessions undertaken for the purpose of strategic or operational planning or staff/student development. Staff meetings or trainings held on-campus are not considered retreats.
- B. When planning retreats, preference is to be given to the use of institutional training resources and services..
- C. The provision of rewards or gifts to staff or students in the form of expensive recreational activities, entertainment, accommodations or catering is not permissible.
- D. Retreats may not be held more frequently than annually, with the exception of student employee or leadership retreats, which may be held more frequently with prior approval from the appropriate vice president or the president. An exception will also be allowed when grant awards call for retreats on a more frequent basis.

III. Retreat Expenditures

A. Allowable Expenditures

- 1. Meals or refreshments may be provided to retreat attendees consistent with the [Meals and Refreshments – Local Funds](#) or [Meals and Refreshments – Appropriated and Grant Fund](#) policies.
- 2. In cases where institutional resources are unavailable or not appropriate for certain functions, reasonable costs associated with room and equipment rentals or training resources and services are allowable, provided that expenditures comply with controlling institutional and state policies.

B. Limitations

1. Costs for entertainment including amusement, sporting or social activities, as well as costs associated with such activities including food, lodging, tickets to shows, and transportation costs, cannot be paid with university funds subject to the following exceptions:
 - a) The event is either (1) part of a formal university-sponsored function, or (2) a self-support instructional program *and* in both cases, participant fees are charged to cover the cost;
 - b) The event is funded by student activity fees, authorized by the University's student association and is for the benefit of student groups;
 - c) The event or activity is approved in a specific grant; or
 - d) The activity is part of athletic travel and the cost is allowed by controlling athletic association guidelines.
2. If an exception applies, all retreat-related costs must be charged to the appropriate account. For example, if a grant award allows for a retreat, all costs associated with the retreat must be charged to the grant account.
3. If no exception applies, recreational, amusement, or social activities funded solely by retreat participants are only appropriate when incidental to the retreat's primary meeting or training.
4. Alcoholic beverages should not be served or consumed during retreats unless in accordance with the requirements of the University's [Public Relations and Alcohol Expenses](#) policy. However, under no circumstances may alcoholic beverages be served or consumed at a student retreat.

IV. Procedures

- A. All retreats must be approved in advance by the appropriate dean or vice president (if a dean or vice president is hosting the retreat, approval must come from that individual's supervisor) based on the submission of a [Retreat Request](#) form, which must:

1. Clearly define the purpose, relevance and expected outcomes of the retreat;
 2. Outline how the retreat interfaces with college and university planning;
 3. Provide a complete schedule of activities, including social and recreational activities;
 4. Identify the various components of the retreat and the breakdown of costs including details related to room rates, catering and any organized meals, speakers, entertainment or recreational activity;
 5. Provide a justification for any overnight component of a retreat, which invariably is a major cost factor for these events (i.e., explain why the event cannot be confined to a single day or be organized over separate but not consecutive days); and
 6. Identify the duration, timing, nature and outcomes of retreats or events of this kind undertaken by the unit in the previous 12 months.
- B. A copy of the approved request form should be submitted to Accounts Payable with retreat invoices, or, in the case of p-card payment, be kept on file as required by the [P-Card](#) policy.