

REGULATION #4202.3

LIMITATIONS ON AUTHORITY FOR EXPENDITURES

The following applies to both School Generated Funds and District Based Funds.

1. INTENT

Limitations have been established on expenditures in order to ensure the values and credibility of the organization are maintained, to promote efficient use of the school district's resources and to ensure compliance with board policies/regulations and other statutory requirements.

2. DEFINITION

For purposes of this regulation, senior management is defined as those individuals holding the title of superintendent, secretary-treasurer, deputy superintendent, assistant secretary-treasurer, assistant superintendent, executive director and director.

3. LIMITATIONS

- 3.1. Gifts and awards to recognize appreciation for extraordinary service or accomplishment may be presented to staff, students, volunteers or guest speakers. The value of the gift should not exceed \$50 per person.
- 3.2. District expenditures for staff and trustees for compassionate purposes, can only be incurred by the Human Resources Department.
- 3.3. Interior decorations for personal offices may not be purchased from board funds. Interior decorations for public areas should be modest and sensitive to the public statement they make on our spending priorities.

3.4. Meeting Snacks and Refreshments

Snacks and refreshments may be provided for meetings at a cost not to exceed \$9 per person in attendance, inclusive of taxes. The purpose of the meeting and the number of attendees must be documented. Names of the attendees, if five or fewer, must be documented. Snack foods are not served at meal times. Prior approval from a member of senior management (for district functions) or a principal/vice principal (for school functions) is required.

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3.5. Group Breakfasts – Staff

Breakfasts may be provided to staff involved in meetings for committees, task groups, in-service or professional development functions where it benefits the flow of the task to have a breakfast provided on site. The cost of such breakfasts shall not exceed \$13 per identified attendee, inclusive of taxes. Prior approval from a member of senior management (for district functions) or a principal/vice principal (for school functions) is required.

3.6. Group Lunches – Staff

Lunches may be provided to staff involved in meetings for committees, task groups, in-service or professional development functions where it benefits the flow of the task to have a lunch provided on site. The cost of such lunches shall not exceed \$18 per identified attendee, inclusive of taxes. Prior approval from a member of senior management (for district functions) or a principal/vice principal (for school functions) is required.

3.7. Group Dinners – In-services, Workshops, Seminars & Conferences

Meals may be provided for employees or others participating in an in-service, workshop, seminar or conference that begins after employees complete their normal duties and continues at least until 19:00 hours. The cost of such meals shall not exceed seventy-five percent (75%) of the applicable meal allowance as set out in [4410-Policy Travel Expense Reimbursement](#). Prior approval of senior management is required.

3.8. Trustees & Senior Management

Meals may be provided for trustees and senior management where a meeting extends for at least two hours through normal meal times.

The claims for these meetings will be made by the member of senior management attending the session.

Expenditures to attend retirement dinners, or banquets in an official capacity (excluding cost of gift) may be claimed by trustees and executive committee.

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3.9. Hosting

Meal reimbursement for approved hosting by trustees, executive committee members and senior management will be allowed within the policy limits for each meal. Guidelines are:

- a) Major hosting requires the superintendent's or secretary-treasurer's approval.
- b) Approved only for non-senior management hosting use.
- c) Non-school district employees, where a benefit is to be derived to the school district.
- d) Itemized receipts are required, including names of person(s) and brief reason for the hosting.
- e) Expenditures must be submitted monthly and approved by the superintendent or secretary-treasurer.

3.10. Incidental Expenses

Trustees' membership in approved organizations related to the functions of the school district, subscriptions, and minor meeting expenses will be pre-approved by the superintendent or secretary-treasurer. Similar expenditures by employees will be approved by the budget officer.

3.11. Special or Exceptional Circumstances

Any expenses deemed to be a benefit to the school district not contemplated under this regulation require prior approval by the superintendent and secretary-treasurer.

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