
SCHOOL DISTRICT NO. 36 (Surrey)

No. 4202.3

REGULATION: LIMITATIONS ON AUTHORITY FOR EXPENDITURES

1. INTENT

Limitations have been established on expenditures by Account Coordinators in order to ensure the values and credibility of the organization are maintained and to promote the productive use of the school district's resources.

For purposes of this Regulation, Senior Management is defined as those individuals employed by the District on a personal employment contract.

2. LIMITATIONS

2.1 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.

2.2 Sympathy expenditures for staff and Trustees can only be incurred by Human Resources Department.

2.3 Interior decorations to personal offices may not be purchased from Board funds, whether district budget or site-based generated. Interior decorations for public areas should be modest and sensitive to the public statement they make on our spending priorities.

2.4 Meeting Snacks and Refreshments

Snacks and refreshments will be provided for meetings at a cost not to exceed seven dollars (\$7), 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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2.5 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 \$14 per identified attendee, inclusive of taxes. Claims for these lunches must be approved by a member of Senior Management

2.6 Group Meals – 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, (or on weekends). The cost of such meals shall not exceed seventy-five percent (75%) of the applicable meal allowance as set out in Policy 4410. Prior approval of the Superintendent or designate is required.

2.7 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.

2.8 Hosting

Meal reimbursement for approved hosting by Trustees, Executive Committee members, and Senior Management will be allowed within the policy limits allowed for each meal and charged to an annual budget. 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.

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- d) Approved for expenditures to attend retirement dinners, or banquets, in an official capacity (excluding cost of gift).
- e) Itemized receipts are required, including names of person(s) and brief reason for the hosting.
- f) Expenditures must be submitted monthly and approved by the Superintendent or Secretary-Treasurer.

2.9 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 Account Coordinators.

2.10 Special or Exceptional Circumstances

Any expenses deemed to be a benefit to the school district not contemplated under this policy must be approved by the Superintendent and Secretary-Treasurer.

Revised: 2011-02-10
Revised: 2006-06-29
Revised: 2001-05-22
Approved: 1998-12-08

X-Ref: Policy 4420
 Reg. 4420.1
 Policy 4600
 Policy 4410
