January 25, 2018

TO: Ginger Ambler, Vice President for Student Affairs
    Adam Anthony, Executive Director, Washington Center
    Kiersten Boyce, Chief Compliance Officer
    Henry Broaddus, Vice President for Strategic Initiatives & Public Affairs
    Courtney Carpenter, Chief Information Officer
    Kate Conley, Dean, Arts & Sciences
    Carrie Cooper, Dean of University Libraries
    Aaron de Groft, Director, Muscarelle Museum of Art
    Davison Douglas, Dean, School of Law
    Joe Dobrota, Director of Financial Aid
    Fanchon Glover, Chief Diversity Officer
    Samantha Huge, Athletics Director
    Michele Jackson, Associate Vice Provost for University e-Learning Initiatives
    Matthew Lambert, Vice President for Advancement
    Teresa Longo, Acting Vice Provost for International Affairs
    Dennis Manos, Vice Provost for Research & Graduate Professional Studies
    Sara Marchello, Associate Provost & University Registrar
    Spencer Niles, Dean, School of Education
    Lawrence Pulley, Dean, School of Business
    John Wells, Dean, School of Marine Science
    Timothy Wolfe, Associate Provost for Enrollment and Dean of Admissions
    Karin Wulf, Director, Omohundro Institute

FROM: Samuel E. Jones, Senior Vice President for Finance and Administration

SUBJECT: Application of University Procurement and Expenditure Policies

Effective for FY 2018, the university implemented new expenditure guidelines that provide greater flexibility for university employees using non-state funds to support William & Mary business. For instance, BOV private funds or other funds raised through advancement activities and certain locally generated revenues from ticket sales or other on-campus events are considered “local funds,” not state funds, and therefore are subject to university spending and procurement guidelines.
Under our new guidelines, these funds can be used, for instance, to cover meal costs up to 200% of allowable per diems. By contrast, meals covered with state appropriated funds, including E&G funds, are capped at 150% in accordance with state policy. Since the implementation of W&M’s local expenditure guidelines, however, some have asked whether they can disregard these guidelines and/or procurement processes by seeking reimbursements for travel, meals or other activities directly from one of the university’s affiliated foundations.

The short answer is “no.” As a university employee, you are expected to follow university policies, guidelines and procedures for travel, business meals, and other goods and services covered by state or university policy regardless of fund source. If you are being reimbursed for a business-related expense or are invoicing an expense directly related to your business activities to a separate foundation, you should still adhere to university policy.

In limited instances, I recognize that university events or donor-designated activities may be funded directly through a foundation or affiliated organization; however, routine university functions, including business travel and business meals, should be handled through the university and must adhere to university expenditure, procurement and related policies.

If you have any questions, please let me know.

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