



BOISE STATE UNIVERSITY

University Policy 6280

Retreats

Effective Date

April 2009

Responsible Party

Chief Financial and Operating Officer and Vice President for Finance and Operations, (208) 426-1200

Scope and Audience

This policy applies to all student and employee retreats.

Additional Authority

- State of Idaho Travel Policies and Procedures
 - OMB Circular A-21 – Cost Principles for Educational Institutions
 - University Policy 1050 (Alcohol Beverage Permitting)
 - University Policy 1055 (Alcoholic Beverages)
 - University Policy 6140 (P-Card)
 - University Policy 6240 (Meals and Refreshments)
 - University Policy 7020 (Drug and Alcohol Free Workplace)
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1. Policy Purpose

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

2. 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.

3. Definitions

3.1 Alcoholic Beverages

Beer, wine, or any beverage containing distilled spirits.

3.2 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

3.3 Refreshments

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

3.4 Retreats

An all-day work or training session held on or 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.

3.5 Self-Support Instructional Program

Academic programs supported almost exclusively by participant fees.

3.6 Staff Meetings

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

4. 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.

5. Retreat Expenditures

5.1 Allowable Expenditures

- a. Meals or refreshments may be provided to retreat attendees consistent with University Policy 6240 (Meals and Refreshments).
- b. 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.

5.2 Limitations

- a. 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:
 - 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;

- The event is funded by student activity fees authorized by the university's student association and is for the benefit of student groups;
 - The event or activity is approved in a specific grant; or
 - The activity is part of athletic travel and the cost is allowed by controlling athletic association guidelines.
- b. 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.
- c. 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.
- d. Alcoholic beverages should not be served or consumed during retreats unless in accordance with University Policy 1050 (Alcohol Beverage Permitting), University Policy 1055 (Alcoholic Beverages), and University Policy 7020 (Drug and Alcohol Free Workplace). Under no circumstances may alcoholic beverages be served or consumed at a student retreat.

6. 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:
- Clearly define the purpose, relevance, and expected outcomes of the retreat;
 - Outline how the retreat interfaces with college and university planning;
 - Provide a complete schedule of activities, including social and recreational activities;
 - 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;
 - 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

- Identify the duration, timing, nature, and outcomes of retreats or events of this kind undertaken by the unit in the previous twelve (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 University Policy 6140 (P-Card).

7. Forms

Retreat Request Form

<https://drive.google.com/file/d/135J0m-NaBEVfnCRLuAXSX1mBTKJapG2O/view>

Last Review Date

November 30, 2023