

## **School of Medicine Guidelines for Chair/Vice-Chair/Director Retirement Events**

Effective Date: 1/1/2019

Last Updated: 9/26/19

**Purpose:** Departments may wish to honor the retirement of a department Chair, Vice-Chair, or Director with a gathering or function. The following guidelines are offered under the umbrella of sound fiscal stewardship of School of Medicine funding.

**Guideline:** Effective 1/1/2019, departments are required to submit a Chair, Vice-Chair, or Director Retirement Party Request Form to the Dean's Office for any planned Chair, Vice-Chair or Director retirement event. The form will be reviewed by the Executive Dean or delegate, and must be submitted prior to purchasing or booking any part of the event. Event expenses may be covered to the extent that the expenses are appropriate to the occasion, reasonable in amount, and serve a purpose consistent with the mission and policies of the university.

**Request Form Requirements:** Request form can be located at: <https://www.med.unc.edu/fbo/policies/>. Please include the event date, number of attendees, total budget for event, whether alcohol will be provided, the event type, and the source of funding for the event. Please submit the form to Holly Rudicil ([holly\\_rudicil@med.unc.edu](mailto:holly_rudicil@med.unc.edu)) in the Finance & Business Operations Office (FBO). FBO will review for appropriateness of fund sources, and obtain the Executive Dean's signature. Once approved, FBO will return the signed form to the department.

**Fund Source Restrictions:** Not all fund sources may be used to pay for business entertainment expenses and/or meetings and amenities. Sponsored Research funds, State Appropriations, State Receipts-Supported funds, and Facilities & Administrative (F&A) Receipts funds are prohibited from use (with limited exceptions). Trust funds must be for discretionary use or consistent with the purpose on the gift agreement/fund authority. Sufficient funding must exist in the source to be used.

If alcohol is provided at the event, please review the [alcohol policy](https://unc.policystat.com/policy/5425325/latest/) to ensure compliance (<https://unc.policystat.com/policy/5425325/latest/>). Please note the approved on-campus venues in section I. B of "Standards – Guidelines for Serving Alcohol at University-Sponsored Events or on University Premises."