



TITLE: Stony Brook Foundation Business Meal & Entertainment Expense Policy	POLICY CATEGORY: Stony Brook Foundation, Inc.
ISSUING AUTHORITY: Stony Brook Foundation, Inc.	RESPONSIBILITY: Stony Brook Foundation, Inc.
PUBLICATION DATE: 05/01/2024	NEXT REVIEW DATE: 05/01/2026

POLICY STATEMENT/BACKGROUND

This policy is intended to guide the Stony Brook Foundation (the “Foundation”) reimbursement and reconciliation process for approved expenses related to business meals and entertainment that is conducted on behalf of or in correlation with the Foundation’s mission. This policy helps govern the use of funds from Foundation accounts for business meals and entertainment expenses (both on-campus or off-campus) that are undertaken in connection with, but not limited to:

- Donor cultivation, fundraising and stewardship activities.
- Programs and activities funded by the Foundation.
- Hospitality or entertainment activities for faculty, staff and/or campus visitors.
- Hospitality on behalf of visiting speakers, community leaders, candidates for faculty and staff positions, current/graduate students and prospective athletes and undergraduate/graduate students.

POLICY

The following policy guidelines should be followed by all State or Research Foundation (RF) employees using Foundation funds for business meal and entertainment expenses either:

- On campus or within 35 miles from either their residence or the University.
- More than 35 miles from either their residence or the University (considered to be in “Travel Status”).

General Business Meal and Entertainment Expense Guidelines

- The Foundation is exempt from New York State and local taxes. Purchasers should present the [Sales Tax Exempt Organization Certification](#) “ST-119.1” form to all merchants for all expenses.
- Tips should not exceed 20% and will be reimbursed upon submission of original receipt with the tip amount noted on the receipt.
- Alcoholic beverages are allowable with supervisor’s approval. For more information about allowable Business Meal & Entertainment expenses along with specific guidelines by funding source, please see the [Food & Beverage Expense Guidelines by Funding Source](#) on the University’s Procurement website.



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- For reimbursement and reconciliation of business meals and entertainment expenses while in Travel Status, please see the [Stony Brook Foundation Travel Policy](#).

REVIEW AND APPROVAL AUTHORITY

Responsibility for administering and adhering to the guidelines for business meals and entertainment policy is assigned to the following personnel/offices:

Employee

The employee seeking reimbursement or reconciling credit card expenses must certify that all business meals and entertainment activities were performed in accordance with applicable Foundation policies. The employee is responsible for filing complete and correct reimbursement reports and corporate credit card statement reconciliations by the requested submittal date each month.

- Monthly credit card statement reconciliations must be submitted through the [CONCUR](#) platform by the due date.
- Reimbursements for business meals and entertainment while not in Travel Status must be submitted using the [SBF Requisition Form](#) and emailed to SBF_AP@stonybrookfoundation.org.
- Employee reimbursement requests and credit card reconciliations for meals and entertainment expenses must include the following documentation:
 - Original itemized receipts for all expenses.
 - Description of the expenditures and justification for use of funds that connects the expenditures to a business need or use.
 - Additional documentation such as a list of attendees, the program or event invitation, agenda, brochure or other supporting documentation.
 - For reimbursements, proof of payment (cash “paid” or credit card receipt) must be included.

Immediate Supervisor

The immediate supervisor must certify that all reimbursement requests and credit card payments for business meals and entertainment activities have been reviewed to ensure that they were performed in accordance with all applicable Foundation policies. The immediate supervisor’s approval signifies that the expenses are accurate, appropriate and were expended for an approved business-related purpose.

Account Manager or Signatory

The account manager or account signatory is responsible for certifying that all payments are accurate and appropriate expenditures for the respective Foundation account, as detailed in the account description, and if applicable, the gift agreement or other gift documentation. The account manager or account signatory certifies that the expenditures are consistent with donor intent at the time the gift/grant was accepted by the Foundation.



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Stony Brook Foundation Business Office

The Foundation business office must certify that all expenses are administered in accordance with Foundation policies and procedures. The Foundation authorizes payment and reimbursement of justified expenses in accordance with the Foundation Business Meal & Entertainment Policy.

CONTACTS

For additional information about this policy, please contact the Stony Brook Foundation:

Stony Brook Foundation

270 Administration Building
Stony Brook, NY 11794-1188
(631) 632-6300

Business Office (631) 632-6536
Accounts Payable (631) 632-4484
Purchasing (631) 632-2108

SBF_AP@Stonybrookfoundation.org
SBF_PO@Stonybrookfoundation.org

RELEVANT STANDARDS, CODES, RULES, REGULATIONS, STATUTES AND POLICIES

Stony Brook Foundation Travel Policy

ADDITIONAL LINKS

[SBF Tax Exempt Form](#)
[Business Meals & Entertainment Requisition Form](#)
[Requisition Form Instructions](#)
[SB University Concur Homepage](#)
[Concur Log-in Page](#)
[SBF Concur Credit Card Reconciliation QuickStart Guide](#)