



'Jacket Leadership Team Meeting Minutes
April 8, 2025 2:00 – 3:30 p.m.

Please share all information from today's meeting with the stakeholder group you represent.

Did You Know?

The five academic programs with the highest enrollment at MSUB are Nursing AS in City College; Business Administration Accounting BS in the College of Business; Business Administration Management BS in the College of Business; Elementary Education BSED BS in the College of Education; and Psychology BS in the College of Liberal Arts and Social Sciences.

INFORMATION

Chancellor Hicswa announced that ROTC Director Captain Jacob Panchau will be completing his service to MSU Billings this semester. He introduced Kyle Meegan who will be taking over as Director of ROTC.

Brett Weisz announced that MSU will begin enforcing an email security policy beginning on April 10. Incoming or outgoing email and attachments that contain sensitive personal information including but not limited to social security numbers, passport numbers, and taxpayer numbers, will be blocked. Secure methods of data transmission, such as DocuSign, will need to be used to communicate sensitive information going forward.

Federal Update

Dan Carter, Director of University Communications and Marketing, provided a federal update. Executive Orders regarding the Department of Education have not impacted disbursement of student loans. The Montana Office of the Commissioner of Higher Education reports that the 2025-26 FAFSA process continues to function as intended. No positions at MSU Billings have been lost due to grant cuts thus far. Chancellor Hicswa announced that Paula Highlander, Director of Human Resources, is working with the Montana University System Employee Assistance Plan (EAP) to prepare workshops for support for employees who are experiencing anxiety over this uncertainty. The first workshop was held today and another will be held on Monday, April 14, at 9:00 am. Discussion followed regarding international students and visa statuses affected by federal actions.

Legislative Update; House Bills 2, 13, and 121

Dan Carter provided the update on the Montana Legislative Session. House Bill 2, General Appropriations Act, which contains funding for Montana 10 and 1-2 Free is through the House subcommittee, and will go to the Senate next. House Bill 13, the State Employee Pay Plan, passed through both houses and was signed by Governor Gianforte. See Paula Highlander's update for detailed information of the changes to the pay plan. House Bill 121, Provide Privacy in Certain Restrooms, Changing Rooms, and Sleeping Quarters, passed through the legislature and was signed by the Governor, but has been challenged in the courts. OCHE instructs campuses to comply with the law and await further guidance.

FY 26 Budget Update

Heather Hanna provided an overview of changes impacting biennial budget, including pay increases, the end of the RMTD Insurance holiday, and benefit cost increases. Additionally, a significant drop in graduate student enrollment impacted revenue by \$355,803. As we approach the end of FY 25, the transfer to reserves will be approximately \$281,511. FY 26 is the last fiscal year that MSUB will need to pay bond debt. DEQ will be paid off in FY 27. See Appendix A.

Canvas Transition and Summer Classes Update

Sue Balter-Reitz and Andrea Aebersold announced that faculty, staff, and students can now access Canvas LMS. Everyone is encouraged to audit websites and materials that mention D2L. All classes will be on Canvas beginning May 12, which is the first day of summer session. Canvas login will require dual factor authentication (Duo) every 24 hours.

President Cruzado's Retirement

Chancellor Hicswa announced that Dr. Brock Tessman has been selected to succeed Waded Cruzado as the MSU President. She invited everyone to sign a card for President Cruzado, and to see Natalie Preston if interested in contributing to gift for President Cruzado.

The next 'Jacket Leadership Meeting is on August 12, 2025.

POLICY

Unallowable and Restricted Expenditures

Jana Marcette, Interim Director of Strategic Academic Initiatives, reviewed changes to gift section, details tied to IRS and reporting that will go in procedures document. Kurt Toenjes moved to approve the policy *Unallowable and Restricted Expenditures*, Richard Beer seconded the motion. The motion passed. See Appendix B.

PRESENTATION

Shared Governance

The Cabinet subcommittee, Suzette Nynas; Kathy Kotecki; Kathleen Thatcher; and Dan Carter led discussion on shared governance. Kathleen introduced shared governance and asked everyone to contribute to the conversation to define and improve shared governance at MSUB. She highlighted the importance of participation and documentation of these ideas. The subcommittee will return to Cabinet for further discussion.

Table Discussion and Reports

Tabletop Group Exercise on Shared Governance at MSUB

Kathy Kotecki asked the group to reflect at their tables on the questions provided and document ideas on notecards. After individual reflection, each table reported on their discussion.

Updates/Announcements (*reprinted as submitted*)

Jerry Girard, Director of Student Health Services

Student Health Services is entering a period of accreditation survey prep. Our next survey by AAAHC is scheduled to happen in the Fall of '25. Following passing with flying colors, under the exemplary leadership of Darla Tyler-McSherry, we are all looking forward to preparing for yet another successful accreditation survey. For this go-round, SHS has an entirely different leadership team, and we are also working in collaboration with MSUB Accreditation and Assessment – thanks Kathleen and Hannah.

Wellness Coordinator Sydney Norwood has been busy hosting student-led events across campus throughout the past month. Also, she and SHS RN Grette Treat worked together with Bekah Gasner in Athletics and Paula Highlander in HR to host NCAA required student-athlete trainings on sexual assault prevention and healthy relationship promotion. This week, April 3-4, Sydney will be taking a group of MSUB student-leaders to participate in the Celebration on the Hill on the Montana State Capitol grounds in Helena. Additionally, Sydney has partnered with the Zonta Club of Billings to bring the *What Were You Wearing* project to City College. *What Were You Wearing* is a display that promotes awareness of sexual assault prevention and will be on display in the Tech Building at City College during the entire month of April which is Sexual Assault Awareness Month.

The Counseling and Medical teams continue to be busy seeing MSUB students with a steady flow of counseling, nursing, and primary care appointments. With flu season winding down, there is no longer flu vaccines available from SHS. The counseling program is currently in the process of selecting next years clinical intern and they are winding down their group programs of equine therapy and Let's Talk. The next on-campus Mental Health First Aid training is scheduled for Tuesday and Wednesday, May 20-21, 1:00 pm – 5:00 pm both days. Be on the lookout for more info coming soon and, as usual, please pass this information along to your teams as well as any other students, staff, faculty, or fiends you think may be interested.

Kathleen Thatcher, Director of Assessment and Accreditation

The NWCCU provided the official feedback on the Year 6 PRFR report. The NWCCU issued no new findings and also marked our only outstanding recommendation as fulfilled. At this time, MSUB has no outstanding recommendations!

The Year 7 NWCCU visit will take place October 8-10, 2025. Please mark this on your calendars. If you receive a request for information related to the year 7 report or visit, please be timely with your response. The College of Education will host their accreditors (CAEP) virtually April 9-11, 2025. Please support the faculty and staff in COE during this important re-accreditation process.

Program assessment reports for City College (April), College of Education (March), and the College of Liberal Arts and Social Sciences (March) are due this spring. Additionally, co-curricular program assessment reports for Academic Affairs and Students Access and Success are due this May. These documents will be considered during the NWCCU's Year 7 report and visit. Please use the support of the Assessment and Accreditation office in advance of these due dates to be sure your program has what it needs to be successful with your assessment efforts.

Paula Highlander, Director of Human Resources

Effective on the first day of the first complete pay period that includes July 1, 2025, the base salary of each employee must be increased by \$1.00 an hour or by 2.5%, whichever is greater. Effective on the first day of the first complete pay period that includes July 1, 2026, the base salary of each employee must be increased by \$1.00 an hour or by 2.5%, whichever is greater.(4) (a) (i) A member of a bargaining unit may not receive the pay adjustment provided for in subsection (3) until the employer's collective bargaining representative receives written notice that the employee's collective bargaining unit has ratified a collective bargaining agreement. (ii) If ratification of a collective bargaining agreement, as required by subsection (4)(a)(i), is not completed by the date on which a legislatively authorized pay increase is implemented, members of the bargaining unit must continue to receive the compensation that they were receiving until an agreement is ratified.

Benefits Annual Enrollment:

April 24-May 15, 2025- Additional information coming soon.

Spring Well Checks:

April 15-16, 2025

6:30 AM - 10:30 AM

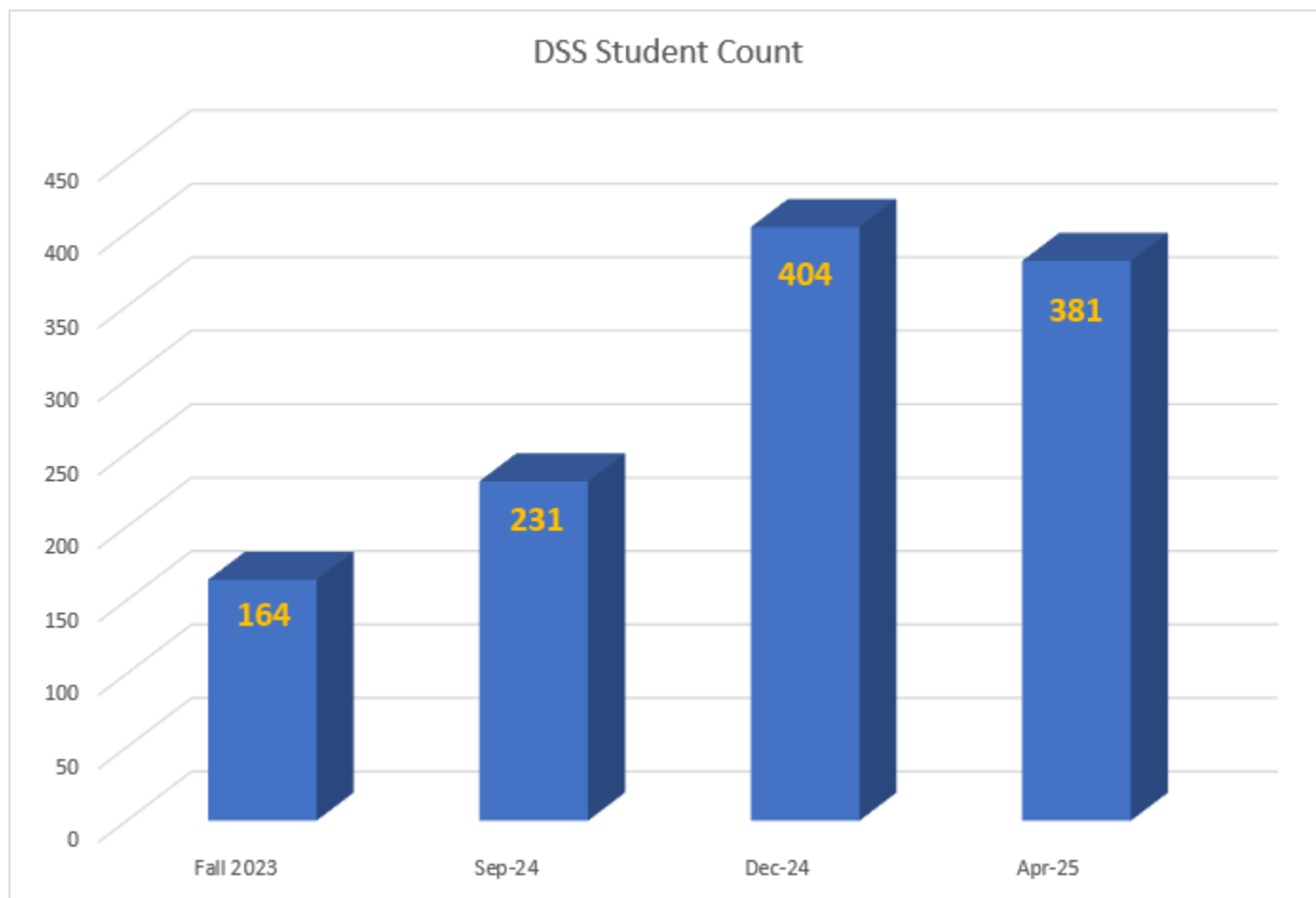
Register Online at my.itstartswithme.com

Greg Gerard, Interim Director of Disability Support Services

Our Sign Language Interpreter, Cathy Copeland, is retiring in May. We plan to adjust the position and start the hiring process this summer.

We've nearly recovered from the flood, with the last pieces of replacement furniture arriving in March. A special thanks to Facilities, Tami Haaland, and the gracious folks in the LA Building for their support during our time there.

The number of students using Disability Support Services continues to grow. In Fall 2023, we served 164 students; by the end of Fall 2025, that number had risen to 404. Currently, we are assisting 381 students.



Julie Pettitt, Executive Director of Undergraduate Admissions

On April 11th, we welcome another group of local District 2 freshman to explore MSUB & City College! Last week, nearly 85 students tackled campus challenges, solved riddles, and got a first-hand look at life as a Yellowjacket. This event is all about making a lasting first impression of life in the Hive!

Fall Orientation – July 14-15! RSVPs are open for new freshmen, transfers, and non-traditional students—keep an eye on your inbox for save-the-dates! Check out the schedule here: www.msubillings.edu/orientation/ Registration Sessions Are Open! First-time freshmen can now sign up for registration sessions! Find session details here: <https://www.msubillings.edu/orientation/freshmen.htm>

Admissions on the Road! Our team is hitting the Montana Tribal Fairs circuit from April 7-17—wish them safe travels as they spread the Yellowjacket spirit across the state!

New Team Member Alert! Help us welcome Rylee Treu on Monday, April 7th! Rylee joins us from the Academic Support Center as a Lead Writing Tutor—be sure to stop by and say hello!

Montana 10 Scholars | Stoles & Goals Graduation Luncheon – Thursday, May 1st, 11:30 AM - 1:30 PM. If you have a connection with an MT10 scholar and want to celebrate their academic achievement, please reach out to Julie Pettitt for details and to RSVP.

Eileen Wright, Director of the Library

The Library recently celebrated their 2nd Annual Library Awards. I want to recognize three colleagues who received awards: *Innovative Leadership* – Nathan Sonnenschein, *Library Team Champion* – Zack Thatcher, and *Spirit of Service* - Emily Reeb. While we congratulated them, it is the whole library team that has supported them to rise, shine, and sparkle this past academic year.

Laura Gittings-Carlson, Executive Director of Office of TRIO ProgramsOffice of TRIO Programs

The Office of TRIO Programs (OTP) at MSUB administers five federally funded TRIO grants. These programs are designed to support individuals who are first-generation and meet income eligibility requirements. Additionally, the Student Support Services (SSS) programs provide specialized support for students with documented disabilities. Collectively, the OTP support individuals from disadvantaged backgrounds in navigating the path to higher education. Services include guidance on college readiness, financial literacy, and assistance with completing financial aid applications, including the FAFSA - serving those who aspire to enter, return to, or continue their postsecondary education.

Each March, a representative from the OTP participates in the Council for Opportunity in Education (COE) Policy Seminar in Washington, D.C. This year, four TRIO staff members—including three TRIO alumni—attended the event from March 15–20. During the congressional recess, the team used personal leave to advocate for TRIO programs, meeting with staff from the offices of three of Montana’s four congressional delegates: Representatives Downing and Sheehy, and Senator Daines.

Plans are underway to offer a Summer Bridge/Return to Learn experience for first-generation and income eligible students in collaboration with other MSUB departments.

We are also proud to announce that Jenn Pope has been elected President-Elect of the Montana ASPIRE Board of Directors.

TRIO Talent Search (TS)

Serves children in middle and high schools throughout Billings and the surrounding region. Two-thirds of individuals in the program must be both first-generation and income eligible.

To date, the Talent Search (TS) program has achieved 90% of its annual goal, serving approximately 540 out of the targeted 600 middle and high school students across 19 schools in Billings and the surrounding area. With over five months remaining in the program year, staff are on track to meet or exceed the enrollment target. In addition, the program has successfully met all five of its federal objectives.

The Executive Director of the Office of TRIO Programs (OTP), along with TS staff assigned to each school, has met with principals and leadership teams at all participating TS schools to request letters of commitment in support of the upcoming TS grant application, due in the summer of 2025.

Appendix A

Fiscal Year 2025 Budget to Actual Mid-Year Review

Presented by Heather Hanna



Legislative updates affecting the 27 Biennium Budget

○HB13 - State Employee Pay Plan

○Increase the base pay for eligible employees by \$1 hour or 2.5%, whichever is greater, each year of the 2027 biennium.

○Employer Benefit Contributions:

○Increase from \$1,054/month, \$12,648/year to:

○FY26 - \$1,080/month, \$12,960/year

○FY27 - \$1,107/month, \$13,284/year



Changes affecting the 27 Biennium Budget

○Revenue

○Tuition

- No known increases at this time. If so, it may be only around 2-3%.

○Expense

- No more RMTD Insurance Holiday
 - Add back to the General Fund Budget
 - approximately \$600K

Does not include
vacancy savings



FY25 General Fund Mid-Year Budget Forecast

General Fund	FY24 Actual	FY25 Budget	FY25 Forecast	% of Total	Variance Fav (Unfav)
REVENUES					
Tuition & Fees	14,973,725	15,568,699	15,049,267	38.2%	(519,432)
Discounting, Scholarships and Waivers	(2,819,212)	(2,971,054)	(2,887,041)	-7.3%	84,013
State Funding	26,525,355	26,668,882	27,058,427	68.7%	389,545
Other Revenue	163,428	127,387	190,503	0.5%	63,116
NET REVENUES	38,843,296	39,393,913	39,411,156	100.0%	17,243
EXPENDITURES AND DEBT PAYMENTS					
Personnel Expenses	30,221,841	32,845,994	32,845,994	81.8%	-
Non-personnel Expenses	6,650,940	6,330,725	6,688,410	16.6%	(357,686)
Debt Payments	651,265	637,073	637,073	1.6%	-
TOTAL EXPENDITURES AND DEBT PAYMENTS	37,524,046	39,813,791	40,171,477	100%	(357,686)
OPERATING INFLOWS (OUTFLOWS)	1,319,250	(419,878)	(760,321)	-	(340,443)

Does not include
vacancy savings

Forecasted GF Deficit:	(760,321)
Vacancy Savings Projection:	1,041,832
Projected Transfer to Reserves	281,511

Personnel Allocation to GF Operating Budget

General Fund	FY22	FY23	FY24	FY25
Personnel Expenses				
Budget	79.077%	79.100%	80.702%	82.499%
Actual	76.994%	78.172%	80.540%	81.764%

Mid-Year Tuition Summary

Category	Sum of 2025 Base Budget	Sum of 2025 Both Ledgers	Variance Fav (Unfav)	% of Base Budget	% of Budget Variance
Tuition-Undergraduate - University Campus	9,218,420	9,102,012	(116,408)	61.1%	25.8%
Tuition-Graduate - University Campus	1,720,370	1,364,571	(355,803)	11.4%	78.9%
Tuition-WUE - University Campus	1,241,435	1,248,530	7,096	8.2%	-1.6%
Tuition - City College	2,798,729	2,781,650	(17,079)	18.6%	3.8%
Tuition - WUE - City College	102,550	133,902	31,352	0.7%	-7.0%
Tuition Total	15,081,504	14,630,665	(450,843)	100%	100%

2024 Year Tuition Detail

Montana State University Billings Tuition History						
Tuition Description	2023 Actual	2024 Budget	2024 Actual	2025 Budget	2025 Actuals	2025 Variance Fav (Unfav)
University Campus Res Undergrad Tuition	6,917,821	7,154,155	6,997,744	7,178,331	7,328,909	150,578
University Campus Non Res Undergrad and Post Bac	1,473,796	1,553,441	1,756,212	2,040,089	1,773,103	(266,987)
University Campus Res Graduate Tuition	1,531,658	1,569,814	1,281,089	1,347,943	1,152,918	(195,025)
University Campus Non-Res Graduate Tuition	490,460	509,150	352,427	372,428	211,653	(160,775)
University Campus WUE	1,237,352	1,287,536	1,212,519	1,241,435	1,248,530	7,096
City College WUE	135,110	140,427	101,207	102,550	133,902	31,352
City College Resident	2,279,381	2,358,003	2,480,230	2,543,004	2,529,629	(13,375)
City College Non-Resident	169,310	173,646	248,964	255,724	252,021	(3,704)
Total	14,234,887	14,746,172	14,430,393	15,081,504	14,630,665	(450,840)
Percentage Change from Prior Year						Budget Variance
University Campus Res Undergrad Tuition	1.0%	3.4%	1.2%	2.6%	4.7%	2.1%
University Campus Non Res Undergrad and Post Bac	-7.8%	5.4%	19.2%	16.2%	1.0%	-13.1%
University Campus Res Graduate Tuition	5.3%	2.5%	-16.4%	5.2%	-10.0%	-14.5%
University Campus Non-Res Graduate Tuition	14.0%	3.8%	-28.1%	5.7%	-39.9%	-43.2%
University Campus WUE	-6.9%	4.1%	-2.0%	2.4%	3.0%	0.6%
City College WUE	-4.3%	3.9%	-25.1%	1.3%	32.3%	30.6%
City College Resident	1.7%	3.4%	8.8%	2.5%	2.0%	-0.5%
City College Non-Resident	14.8%	2.6%	47.0%	2.7%	1.2%	-1.4%



Be Brave. Be Bold. *Become.*

Scholarship & Waivers Comparison

FY25 Budget to Actuals				
	FY2024 Budget	FY2025 Budget	FY2025 Projection	Variance Fav(Unfav)
Scholarships				
Adult Learner/Persistence	63,000	43,000	38,267	4,733
Athletics	275,616	275,616	275,616	-
Montana 10	85,000	93,000	46,792	46,208
Sprint	24,000	160,000	60,642	99,358
Student Access	75,305	75,305	41,416	33,889
Yellowjacket Excellence	214,240	214,240	214,240	-
Other	95,229	95,205	84,666	10,539
Total Scholarships	832,390	956,366	761,640	194,726
Waivers				
American Indian	500,000	515,000	577,065	(62,065)
Athletic	960,203	970,203	1,037,835	(67,632)
Faculty & Staff/Dependent	100,000	113,020	154,254	(41,234)
Graduate	64,050	64,050	49,500	14,550
MT National Guard	41,600	60,000	68,523	(8,523)
MT Trailhead	246,483	188,500	131,875	56,625
2nd Chance Pell	-	-	10,676	(10,676)
Other	184,771	103,915	95,674	8,241
Total Waivers	2,097,107	2,014,688	2,125,401	(110,713)
Total Discounting, Scholarships & Waivers	2,929,497	2,971,054	2,887,041	84,013

Be Brave. Be Bold. *Become.*



Projected Reserve Balance

Reserves	FY21 Ending Balance	FY22 Ending Balance	FY23 Ending Balance	FY24 Ending Balance
Retirement Reserve	180,276	180,276	150,276	200,276
Operating Reserve - General Fund	4,113,987	4,997,153	5,029,306	5,596,147
Operating Reserve - Montana 10*	224,959	391,374	662,525	751,284
Scholarship Reserves	1,807,279	2,289,385	1,424,988	1,474,704
Facilities Deferred Maintenance	224,616	334,818	637,098	540,426
TOTAL RESERVES	6,551,117	8,193,006	7,904,193	8,562,837

FY24 Ending Reserve Balance 8,562,837

FY25 Projected Transfer to Reserves 281,511

Projected Balance at 6/30/25 8,844,348

*Funds are restricted for MT 10 use only



University Debt

Annual Debt Service						
	FY24	FY25	FY26	FY27	FY28 & Beyond	Total
General Fund						
DEQ	61,817	46,910	46,910	46,910	-	202,547
Lease	590,163	590,163	8,820	8,680	29,400	1,227,226
Total	651,980	637,073	55,730	55,590	29,400	1,429,773
Designated						
Library & LA Boilers	64,715	46,560	47,010	46,703	428,273	633,261
Leases	83,080	81,316	81,353	81,391	16,291	343,430
	147,795	127,876	128,363	128,094	444,564	976,691
Auxiliary						
Bond	928,838	920,191	927,123	-	-	2,776,152
Intercap	111,598	322,556	314,430	306,422	2,032,063	3,087,069
Total	1,040,436	1,242,747	1,241,553	306,422	2,032,063	5,863,221
Grand Total	1,840,212	2,007,696	1,425,645	490,106	2,506,027	8,269,686

Auxiliary Bond Debt will be paid off in FY26! This will free up almost \$1M per year in pledged debt service.



Be Brave. Be Bold. *Become.*

Questions?

Be Brave. Be Bold. *Become.*





205.0 Unallowable and Restricted Expenditures

Subject	Accounts Payable
Revised	XXXX
Effective Date	03/2013
Review Date/s:	XXXX
Responsible Party	Business Services, Financial Services & Payroll

1. INTRODUCTION AND PURPOSE

The following is a list of restricted and unallowable charges for official university business. Purchases made on sponsored programs or indirect costs (IDC) funds or student club accounts may have additional considerations. Questions about an expense not listed should be directed to department coordinators, supervisors, the Office of Grants and Sponsored Programs, or a Business Services representative.

2. UNALLOWABLE EXPENSES

Unallowable expenditures include, but are not limited to:

- A. Airfare - seat upgrades unless ADA approved. ADA declaration documentation must be provided.
- B. Cash - cash withdrawals or non-travel cash advances.
- C. Donations - contributions or donations, including financial donations or gift components when registering for a conference, or “rounding up” at a merchant to donate to a cause or organization. Except for donations from student club accounts
- D. Fuel – fuel expenses for personal vehicles – must request mileage reimbursement on travel expense report.
- E. Hospitality - hospitality-related office supplies such as coffee, plates, napkins, tissue, etc. that are intended for employee consumption.
- F. Memberships - memberships such as Costco or Amazon where MSUB has corporate programs.
- G. Services - services provided by an MSUB employee. Payment should occur through the Payroll Office.
- H. Transactions - dividing transactions to circumvent purchasing thresholds. See General Purchasing Guidelines.

3. RESTRICTED EXPENSES

Restricted expenses include, but are not limited to:

- A. Alcohol and Drugs - purchase of drugs and alcohol or any substance, material or service, which violates policy, law or regulations is not allowed with the following exceptions:
 - 1. Alcohol - see the [Alcohol Policy](#).
 - 2. Drugs - may be purchased for medical purposes or for a sponsored research project.
 - 3. Tobacco - see the Tobacco Free Campus Policy.
- B. Clothing (non-uniform) - certain clothing may be purchased if it is required and utilized for protective personal equipment (PPE), research, or education (e.g., scrubs, lab coats, etc.). If purchased on sponsored program funds, include justification. Clothing items such as MSUB-branded shirts for events where employees represent the university may be allowable under specific conditions and are subject to a taxable threshold. See Restricted and Unallowable Policy Procedure.
- C. Gifts - gifts must serve official university business and are subject to additional requirements. Purchase of gift cards or gift certificates including from agency accounts is not allowed except for gift cards or certificates used for research or survey participants which are subject to additional requirements. See Restricted and Unallowable Expenditures Policy Procedure.
- D. Graduation Regalia - regalia for faculty and other campus leaders who participate in graduation may be provided by the University when approved by the applicable vice-chancellor/chancellor.
- E. Equipment - Equipment with a trade-in. Contact Financial Services Office.

- F. Moving / Relocation Expenses or Allowances - relocation allowances when approved by the applicable vice-chancellor/chancellor are taxable and paid through payroll.
- G. Parking Permits and Citations - long term MSUB parking permits for privately owned vehicles and payment of parking citations are not allowed with the following exceptions:
 - 1. Parking permits can be purchased for university-owned, State of Montana, or government vehicles.
 - 2. Short-term parking permits can be purchased for visitors on official business only. See Restricted and Unallowable Expenditures Policy Procedure.
 - 3. When grant funded, which is subject to additional requirements. Contact Sponsored Programs for guidance.



POLICIES

1500 University Drive
Billings, MT 59101

205.0 ~~Non-Allowable and Restricted~~ Expenditures

Subject	Accounts Payable
Revised	XXXX
Effective Date	03/2013
Review Date/s:	XXXX
Responsible Party	Business Services, Financial Services and Payroll

1. ~~INTRODUCTION AND PURPOSE~~ ~~Personal or Other Expenses:~~

The following is a list of restricted and unallowable charges for official university business. Purchases made on sponsored programs or indirect costs (IDC) funds or student club accounts may have additional considerations. Questions about an expense not listed should be directed to department coordinators, supervisors, the Office of Grants and Sponsored Programs, or a Business Services representative.

~~A. The University Purchasing Manual states that "...purchases for personal use are not allowed." Personal expenditures are not allowable for reimbursement, regardless of the funding source. Below are some examples that University Business Services considers to be personal or other unallowable departmental expenditures, and as such are not reimbursable.~~

2. ~~UNALLOWABLE EXPENSES~~

Unallowable expenditures include, but are not limited to:

- A. Airfare - seat upgrades unless ADA approved. ADA declaration documentation must be provided.
- B. Cash - cash withdrawals or non-travel cash advances.
- C. Donations - contributions or donations, including financial donations or gift components when registering for a conference, or "rounding up" at a merchant to donate to a cause or organization. Except for donations from student club accounts
- D. Fuel – fuel expenses for personal vehicles – must request mileage reimbursement on travel expense report.
- E. Hospitality - hospitality-related office supplies such as coffee, plates, napkins, tissue, etc. that are intended for employee consumption.
- F. Memberships - memberships such as Costco or Amazon where MSUB has corporate programs.

~~1. Cash~~

~~a. Cash may not be charged the University Purchasing Card and transferred to a personal One Card.~~

~~2. Gifts, Gift Cards or Awards~~

~~Gifts given for graduation, birthday, leaving MSUB employment, service of work completed, Secretary's Week, awards to students outside the Financial Aid process, weddings, showers, etc.~~

~~a.~~

~~3. Flowers~~

~~a. Given as a gift, for a funeral, or for office. Purchase of flowers may be allowable if they are business related with approval from University Business Services.~~

~~4.—Cards~~

- ~~a. Purchased for greetings, birthday, wedding, "going away" or retirement, funeral, etc~~
- G. Services - services provided by an MSUB employee. Payment should occur through the Payroll Office.
- H. Transactions - dividing transactions to circumvent purchasing thresholds. See General Purchasing Guidelines.

3. RESTRICTED EXPENSES**Restricted expenses include, but are not limited to:**

- A. Alcohol and Drugs - purchase of drugs and alcohol or any substance, material or service, which violates policy, law or regulations is not allowed with the following exceptions:
 - 1. Alcohol - see the Alcohol Policy.
 - 2. Drugs - may be purchased for medical purposes or for a sponsored research project.
 - 3. Tobacco - see the Tobacco Free Campus Policy.
- B. Clothing (non-uniform) - certain clothing may be purchased if it is required and utilized for protective personal equipment (PPE), research, or education (e.g., scrubs, lab coats, etc.). If purchased on sponsored program funds, include justification. Clothing items such as MSUB-branded shirts for events where employees represent the university may be allowable under specific conditions and are subject to a taxable threshold. See Restricted and Unallowable Policy Procedure.
- C. Gifts - gifts must serve official university business and are subject to additional requirements. Purchase of gift cards or gift certificates including from agency accounts is not allowed except for gift cards or certificates used for research or survey participants which are subject to additional requirements. See Restricted and Unallowable Expenditures Policy Procedure.
- D. Graduation Regalia - regalia for faculty and other campus leaders who participate in graduation may be provided by the University when approved by the applicable vice-chancellor/chancellor.
- E. Equipment - Equipment with a trade-in. Contact Financial Services Office.
- F. Moving / Relocation Expenses or Allowances - relocation allowances when approved by the applicable vice-chancellor/chancellor are taxable and paid through payroll.
- G. Parking Permits and Citations - long term MSUB parking permits for privately owned vehicles and payment of parking citations are not allowed with the following exceptions:
 - 1. Parking permits can be purchased for university-owned, State of Montana, or government vehicles.
 - 2. Short-term parking permits can be purchased for visitors on official business only. See Restricted and Unallowable Expenditures Policy Procedure.
 - 3. When grant funded, which is subject to additional requirements. Contact Sponsored Programs for guidance.

~~5.—Parking Decal and personal fines~~

~~a. Parking Decal is a personal expense as discussed in MSU's Parking Regulations at <http://www.msubillings.edu/police/parkinginfo.htm> Fines incurred are also considered personal expenses.~~

~~b. The purchase of temporary parking hangtags may be allowed if they are for a visitor from another state agency, candidate for a position, workshop attendees, visiting dignitaries, etc.~~

~~6.—Graduation Regalia and other clothing (non-uniform)~~

~~a. Graduation regalia—cap, gown, and hood—are all personal expenses whether they are for a student or Faculty.~~

~~b. Certain clothing may be purchased if it will be consumed in the course of completing a research~~

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Non-Allowable
Expenditures

~~project.~~

~~7. Office treats~~

- ~~a. Purchase of treats for office personnel is not an allowable expenditure.~~
- ~~b. Retirement, Going Away, or other personal office events.~~

~~8. Office Supplies~~

- ~~a. Coffee, plates, napkins, tissue, etc. Any items consumed by employees is not allowed.~~

~~9. Donations~~

- ~~a. Donations are not allowed to any organization including charitable organizations.~~
- ~~b. Exceptions are donations from student club accounts.~~

~~3. Drugs and Alcohol~~

- ~~A. Purchase of drugs and alcohol or any substance, material or service, which violates policy, law or regulations pertaining to Montana State University is not allowed with the following exceptions: Drugs may be purchased for medical purposes through the Student Health Service or for a sponsored research project. Alcohol may be purchased for approved events if the Alcohol Request Form has been completed and approved. See the MSU Alcohol Policy.~~

~~*** Non-Allowable reimbursements are not limited to this list.~~