

## Finance Updates

### DASA Directors Meeting 3/21/18

DASA operates as a part of NC State University and the State of North Carolina. As such, we are collectively responsible for following policies and procedures and ensuring that all financial transactions are valid and appropriate.

The University Controller's Office at NC State offers helpful information via their website to ensure that policies and resources are readily available and accessible. All funds are subject to state spending guidelines unless explicitly allowed as an exception (such as in a trust fund authority or a donor document); there are very few exceptions to these guidelines.

#### University Controller's Office - [controller.ofa.ncsu.edu](http://controller.ofa.ncsu.edu)

- ❖ Navigate to Resources & Forms
  - Guidelines & References (Requires Login)
    - Spending Guidelines (attachment should open)

#### North Carolina State University – Basic Spending Guidelines by Fund Source (April 2008, 17 pages)

##### Unallowable Purchases (reference pages 6-7)

- Alcoholic beverages
- Items for personal use (such as tissues, hand sanitizer, etc.)
- Food including coffee, tea, drinks, candy, snacks, break refreshments, etc. for consumption by employees (including student employees) and/or guests
- Medications (such as pain relievers, aspirin, etc.) and/or medical supplies
- Appliances such as microwaves, coffee pots, refrigerators, or related items
- Plants or flowers (live or artificial)
- Framing of pictures, art, diplomas, etc. for use in a personal office for decorative purposes
- Party items or other decorative items to decorate an office for an office party, holiday party, etc.
- Picnic items (paper plates, cups, napkins, forks, spoons, etc.) for office/employee use
- Rental of portable water dispensers and purchase of bottled water
- Purchase of gifts or flowers for employee or non-employee
- Purchase of get well cards, sympathy cards, birthday cards, Christmas or other holiday cards
- Purchase of personal clothing items or t-shirts which are not part of required uniforms, safety related, or program related (for example, for use in textile research)

##### Other Important Resources Available via "Guidelines & References"

- Approving and Monitoring Departmental Financial Activities
- Contract Management
- Purchasing Guidelines
- Travel Guidelines
- Trust Fund Guidelines

**If you have any questions or need assistance, please contact a member of the DASA Finance team.**