

## **REPORT OF EXPENDITURES & FINANCIAL TRANSACTIONS** **INSTRUCTIONS**

PART A deals with “expenditures” made to, at the request of, for the benefit of, or on behalf of any particular member of the general assembly, any particular member of the controlling board, the governor, the director of an administrative department, or any particular member of the staff of the foregoing public officers or employees (hereafter, a “decisionmaker”). The term “expenditure” encompasses virtually anything of value, including food, beverages, entertainment, lodging, transportation, gifts and any promise to make a gift, whether or not legally enforceable. “Expenditures” are reportable even if made in a social context without any intent of influencing legislation or other government action. However, personal (unreimbursed) expenditures made by employees are not covered.

PART B deals with “financial transactions,” which are defined as activities that are conducted jointly for profit between the University and a decisionmaker. Because joint transactions of this type violate University policies, the appropriate response to the form is “none.” If any such transactions occur, or may have occurred, the matter should be reported to the Office of General Counsel for further review.

If your report involves more than one decisionmaker, please file a separate report for each decisionmaker named.

For each “expenditure” reported, attach all receipts and other records (or copies thereof) relating to the expenditure.