


WVU School of Dentistry

Finance & Administration Standard Operating Guidelines

January 07, 2025

It is the mission of the West Virginia University (WVU) School of Dentistry (SOD) to promote a diverse and dynamic learning environment that addresses the present and future oral health needs to the citizens of West Virginia and beyond by providing an oral health center committed to excellence and innovation in education, research, patient care, service and technology. A strong infrastructure has been established to ensure this mission is met. With any infrastructure, adherence to guidelines to ensure compliance with the State of WV, WVU, WVU Research Corporation, WVU Foundation and WVU Dental Corporation/WVU Hospitals policies and procedures is imperative. To that end, SOD finance and administration standard operating guidelines (SOG) have been established to assist with compliance of all policies and procedures. Annual review of all SOGs will occur and revision made as necessary to ensure compliance as well as congruence with any changes by the WVU Office of Administration and Finance, the State of WV and the Dental Corporation. Responsibility and maintenance for the Finance and Administration SOGs rests with the School of Dentistry's Chief Business Planning Officer and, ultimately, the Dean of the School of Dentistry.


BUDGETING OF FUNDS	SOD SOG 001
Last Reviewed: 01/07/2025	Approved: 

The WVU fiscal year covers July 1 through June 30. Approximately 4-6 months from the end of the current fiscal year, a budgeting process will begin and continue until a budget is finalized for the next fiscal year. Allocations of central funds will be determined by the Health Sciences Center (HSC) Office of Finance and communicated to the Dean of the SOD. Input from Chairpersons and other faculty and staff, as needed, will be collected and collated by the SOD EBO (Expert Business Office) to form a draft budget. The draft budget will be reviewed by the Chief Business Planning Officer and submitted for approval to the Dean. Once approved and finalized, the budget will be submitted back to HSC Finance and then entered into the Mountaineer Administrative Processes (MAP) system.

Grants/Contracts budgets are determined on a project by project basis. Please see separate Grants Management SOG Manual.

As the fiscal year progresses, chairpersons and/or center directors, with assistance from departmental/center representatives, are responsible for monitoring and/or approving spending from their budgets, ensuring spending does not exceed the allocated budget. Departmental representatives have MAP access to provide reports as needed to assist with this task. The SOD EBO is also available to pull reports upon request. Each department and/or center is provided with specific information relative to each grant and/or contract faculty may have. This information is used to verify that any purchases made fall within the specific guidelines of the grant/project/contract.


The Dental Corporation year covers January 1 through December 31. Currently the budget process is completed in the Expert Business Office.

SOURCES OF FUNDS	SOD SOG 002
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The table below defines the types of funding the SOD currently uses to operate:


Type	Description
State	Allocated either directly through appropriations or the HSC central allocation process.
Tuition & Fees	Allocated through HSC.
WVU Research Corporation	Externally funded projects acquired through faculty project submission/acceptance/award.
Foundation	Donated funds.
Special Revenue	Auxiliary accounts created via service contracts, college and academic innovation fees, etc.
WVU Dental Corporation	Revenue and Expenses generated by practice plan.

State funds may revert back to the State or HSC Finance if unused. Special Revenue and Foundation funds carry forward and Research Corporation funds are restricted to the terms and definitions of the external funding agency. Dental Corporation funding is as separate 501-c-3, as determined by the Board. Departmental operating budgets will be primarily set up in state funding. Foundation funding may be available for certain departmental needs as donations are received for specific purposes.

USES OF CENTRALLY ALLOCATED, RESEARCH CORPORATION, & SPECIAL REVENUE FUNDS, Dental Corporation	SOD SOG 003
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All uses of funds housed in the SOD must meet the following requirements:

- Appropriate business purpose which indicates why the expenses are reasonable, appropriate, and needed for University business, not simply what was purchased.
- Documentation (receipts, proof of receipt, proof of prior authorization when applicable) detailing the purchase.
- Approval for use of funds (according to Purchasing Hierarchy SOG 004).

PURCHASING HIERARCHY	SOD SOG 004
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All purchases must fit within the budget of the current fiscal year or defined research project. Any exceptions may only be approved by the Dean or his/her designee. The table below defines the exact amounts of purchases, prior approval required and title of the individual making the purchase.


Amount	Prior Approval	Purchaser
\$1-\$200	Budgeted Item or Principal Investigator (PI)	Departmental or Center Representative
\$201-\$1,000	Department Chair or (PI)	Departmental or Center Representative
\$1,001-\$5,000	Department Chair or (PI) + EBO	Departmental or Center Representative
\$5,000-9,999*	Department Chair or (PI) + CBO Finance + EBO	EBO
\$10,000 & up	Department Chair or (PI) + CBO Finance + EBO, Dean	EBO

The Principal Investigator (PI) of any sponsored project is to be aware of any purchase from his/her externally funded project. Therefore, the PI must give prior approval in accordance with the defined purchasing hierarchy and/or specific externally funded agency requirements. Departmental/Center Representatives are the individuals possessing the credit cards or knowledge of how to spend the resources. In defined departments, these are the administrative secretaries, administrative associates and/or program assistant. In centers, these are the staff and/or faculty in positions tasked with making purchases in accordance with center organization.

The primary mechanism used to spend from established budgets will be using the University's purchasing portal, Mountaineer Marketplace. Purchases not available in Mountaineer Marketplace and/or emergency purchases can be made using the procurement card. The pcard is issued for both State funding as well as Research Corporation funding and has specific rules for use as detailed in the Procurement Card Processing SOG.

*Requires a "Requisition to Purchase":

<https://mapfiles.wvu.edu/content/creating%20a%20requisition%20in%20map/wi/html/>

PRIOR APPROVAL TO SPEND	SOD SOG 005
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Any employees spending SOD funds will comply with the SOD internal controls document, purchasing hierarchy and relevant policies and procedures. All purchases require appropriate business purpose, documentation and approval for use of funds. Some types of expenditures also require unique processing such as Travel, Hospitality, Information Technology, Rental of Space or Service Agreements. When prior approval for an expenditure is required, the following information will be needed:

Type of Expenditure	Prior Approval Information Required	Approval Granted By
Any Expenditure over \$200	Description of item, business purpose, amount, documentation	Department Chairperson or PI via email confirmation to purchaser
Overnight Travel	Traveler name/title, business purpose, dates, destination	Department Chairperson or PI via email/form attachment confirmation to traveler
International Travel*	Traveler name/title, business purpose, dates, destination	Department Chairperson or PI + Dean via email/form attachment confirmation to traveler
IT Related Purchases	SOD IT electronic form request	Department Chairperson or PI and SOD IT Staff review/approval via email/form attachment
Hospitality	SOD/WVU Hospitality/Event Documentation electronic form	Department Chairperson or PI
Space Rental	SOD Space Rental Request	Department Chairperson or PI and WVU Real Estate Services
Service Agreements**	Vendor, Business purpose, Dates	Department Chairperson or PI via email confirmation to purchaser


*International Travel requires registration with the WVU Office of Global Affairs. Follow this link for more information: international.wvu.edu/travel/registration

**Any type of special contractual agreement such as those entered into with consultants, speakers, subcontracts or other general services. Please follow links below for more information, forms, etc.

taxservices.wvu.edu

procurement.wvu.edu/rules (Rules, Policies and Procedures)

financediv.wvu.edu

TRAVEL PROCEDURES	SOD SOG 006
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Prior Approval Requirements:

As the need dictates that faculty, staff, residents and/or students travel for SOD business purposes, the table below details the prior approval requirements:

QUESTION	YES	NO
Is the travel going to be overnight?	Advanced Travel Authorization approval required	Advanced verbal approval required
Is a travel settlement going to be submitted for reimbursement?	Attach advanced Travel Authorization approval to settlement	Keep advanced Travel Authorization approval with pcard receipts

Travel Authorization Form - Approval Requirements

Traveler	Approval 1	Approval 2	Approval 3
Chair	Dean		
Faculty	Chair	Dean	
Staff	Supervisor/Chair/Associate Dean	Dean	
Resident Education	Program Director	Dean	
Resident Research	Program Director	Associate Dean for Research and Postdoctoral Affairs	Dean
Student Education	Faculty Advisor	Academic Affairs	Dean
Student Research	Faculty Mentor/Advisor	Associate Dean for Research and Postdoctoral Affairs	Dean

(Travel Authorization form is attached to this document as Exhibit A.)

Process Requirements:

The SOD has identified that the departmental/center representatives will be travel coordinators for their respective areas and the Administrative Assistant (located in the Dean's suite) will be the coordinator for any other travel that is arranged and/or submitted. Online booking is strongly encouraged for domestic travel, using the University's online booking tool, My Travel. The process for arranging travel using SOD funding is listed below:

1. Work with the appropriate travel coordinator to obtain appropriate approvals (see Purchasing Hierarchy SOG 004 and Prior Approval to Spend SOG 005).
2. Travel Coordinators (or other cardholder) arrange for flight, registration prepayment using My Travel or pcard. Foundation sponsored travel may be scheduled using My Travel if funding authorization has been established in MAP (POETA).

3. Traveler retains all receipts during course of trip, any personal vehicle mileage is tracked. Note: personal meals are not permitted on pcards.
4. Upon return, traveler or travel coordinator is responsible for the timely submission of expense reports in MyExpenses or the Foundation's ChromeRiver. If a delegate submits a report on the traveler's behalf, the traveler must review and approve the report in MyExpenses or ChromeRiver.
5. Expense reports submitted in MyExpenses or ChromeRiver will be routed to the traveler's designated approvers for authorization and approval of expenses of employees; supervisors, EBO and PCPS.

Selected General Guidelines:


The WV Travel Manual details all allowable expenses and regulations, however, below are general guidelines governing the travel process:

- My Travel is the preferred method for scheduling and booking travel, the Pcard is the secondary payment method for travel expenses (individual traveler's meal expenses are never charged to the Pcard). Because WVU and the WVU Research Corporation are tax exempt entities, taxes are not charged and this expense is saved by using My Travel and/or the Pcard.
- For expenses paid with personal funds or personal credit cards, employees are responsible for submitting all documentation within 30 days after the last day of approved travel to receive reimbursement. SOD departmental guidelines may indicate a shorter timeline.
- State and Foundation funded reimbursements may be made via direct deposit. Research Corporation funded travel reimbursements will be made via check.
- Any expenses incurred using the Pcard require original receipts. If a receipt is not available, a "PCard Receipt Exception Form" must be completed and given to the Departmental Card Coordinator.
- For all expenses paid using personal funds, original itemized receipts are required. If an original itemized receipt is not available, the traveler must certify the receipt copy or other proof of payment by writing: "I hereby certify this is only available copy of this receipt" and sign the certification.
- Careful records must be maintained to separate personal expenses incurred from the reimbursable or allowable business expenses of a trip. Personal expenses will not be reimbursed.
- Business related air transportation is reimbursed for the least expensive and logical airfare via the most direct route. Processing fees and fees incurred for changes in airfare plans due to business related reasons or other extenuating circumstances are permitted.
- Unallowable air transportation expenses include: deliberately causing increase costs or delays for the purpose of obtaining personal gratuities, specifying a particular airline to accumulate promotional plan mileage or fees incurred for changes in airfare due to traveler's negligence.
- If a traveler chooses to drive rather than fly while on business, reimbursement will be based on actual in-transit expenses not to exceed the lowest available commercial airfare plus local transportation and related expenses to and from the airport.

- Lodging expenses are permitted for: room charge, applicable taxes or fees, business internet access and business phone charges. Unallowable expenses are: multiple occupancy charges when only one traveler is on SOD business, personal entertainment expenses (ie: movies), personal internet access and personal phone charges.
- Meals are reimbursed on a per diem or by receipt basis, whichever method is more cost effective. Reimbursement is based on days of travel and destination. Calculations of meal reimbursements will be made based on the tables at the following links: gsa.gov/travel/plan-book/per-diem-rates for domestic travel and aoprals.state.gov for international travel.

THE WVU TRAVEL GUIDE IS LOCATED BEHIND THIS SOG FOR MORE INFORMATION.

procurement.wvu.edu/rules (Rules, Policies and Procedures)

TRAVEL PROCEDURES	SOD SOG 006-01
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The School believes it is very important to ensure we are positively and adequately represented at appropriate events nationally and internationally. The following categories of travel for all faculty, staff and/or students will be supported, regardless of funding source, finances permitting:

- Travel expenses related to representing the School at a meeting or event
- Travel expenses related to presenting at a meeting/event
- Travel expenses related to conducting business on behalf of the School at the meeting or event
- Travel expenses related to preparing for Board certification


Exceptions to these three conditions must be granted by the Dean via written request and attached with any relevant travel expense documentation. Existence of one or more of these criteria must also be attached with any relevant travel expense documentation.

Prior approval must be received at least one month prior to incurring expenses. Funding of these events should follow the SOD purchasing hierarchy (SOD SOG 004) and WVU, WVU Foundation, WVU Research Corporation and/or Dental Corporation travel guidelines. All requests for reimbursement must be received within 30 days of completion of the trip. Additionally, requests for reimbursement will not be honored after the close of the fiscal year in which the trip occurred.

Chairpersons can submit for travel support in their state budget prior to the beginning of each fiscal year (July 1) or utilize foundation funding available to the specific unit or specialty.

Additional Considerations:

- **Meal Reimbursements** – If a traveler is attending a conference or any other type of meeting where meals are provided, those meals will be deducted from the per diem rate for that day. Exceptions to this will be if the employee has documented food allergies or is on a restricted diet that would place the employee in harm if they consumed the offered meal items. Exceptions must be noted on the signed travel authorization form prior to the travel.
- **Trip Reports** – The investment of SOD funds in faculty travel is an important part of the growth and development of the faculty. For that reason, the SOD expects the investment to produce a tangible work product that can be shared with other members of the faculty and that can become part of the faculty member’s portfolio in Digital Measures. Therefore, within one month of the completion of a trip supported with SOD funds, the faculty member should submit a written report to his/her department chairperson and the dean. This report should summarize the results of the trip (not a description of what occurred, but the outcomes of the experience), and attach any papers delivered or other relevant materials.
- **Sponsored Travel** – When circumstances occur that a traveler’s costs have been covered by another entity, including an honorarium for speaking, vacation must be taken for the time away. If no honorarium is paid and the traveler is representing the school, vacation does not need to be taken.

IT PURCHASES	SOD SOG 007
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The Health Sciences Center (HSC) Information Technology department's goal is to provide assistance to all HSC Schools and specifically, to ensure that the SOD is fully supported in our IT and related needs. To succeed in this goal, we must communicate our purchasing plans as they relate to IT and interact with any HSC wide systems. Therefore, the SOD IT staff needs to be included in any decision-making relative to these types of purchases.

Excluding any initial IT purchases for new hires, departments may use departmental and/or research funding (if approved by external funding source) for purchases of IT and related products. This includes laptops, desktops, printers, etc.

Prior to purchasing any IT related item, the following information will need to be completed and sent to SOD IT to ensure an adequate inventory is tracked and planned replacement may occur:

- Name of purchaser
- Phone number of purchaser
- Detailed description of item to be purchased
- Item to be replaced (if applicable) by purchase
- Purchase quote
- Hardware and Software Pre-Purchase Questionnaire (link below)


www.teamdynamix.com/TDClient/Requests/ServiceDet?ID=14076

HOSPITALITY PURCHASES	SOD SOG 008
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Hospitality is defined as “food, non-alcoholic beverages, and related expenses for the reception of guest by a spending agency for a specific event or function related to conducting State business.” The process for accessing SOD funding for hospitality purposes is detailed below:


1. Obtain prior approval regardless of amount or funding.
2. Arrange event ensuring compliance with WVU Hospitality Services Policy (see link below)
3. Complete electronic WVU/SOD Hospitality/Event Documentation form

procurement.wvu.edu/rules/rules (Rules and Policies)

SPACE RENTAL	SOD SOG 009
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As the need arises for additional SOD space that cannot be accommodated on existing WVU property for storage and/or additional site locations, the following process should be used:

1. Obtain approval as required in the Purchasing Hierarchy.
2. Complete SOD Space Rental electronic form and forward to SOD EBO for tracking.
3. Contact WVU Real Estate Services with a description of space needs and requirements.
4. Work with WVU Real Estate Services to select a WVU preferred space vendor and associated contracts.
5. Pay for space in accordance with agreement set forth.

PROCUREMENT CARD PROCESSES	SOD SOG 010
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The primary mechanism used to make SOD purchases is the University’s payment portal, Mountaineer Marketplace. A procurement card (pcard) will be issued for purchases not available in Mountaineer Marketplace or in the event an emergency purchase is required. Each cardholder is assigned a default funding string to which the expenses are to be charged. If a different account should be charged, it is up to the cardholder to alert the Departmental Card Coordinator (DCC) of the change via email the same day of the purchase. The SOD has assigned the Business Manager the role of DCC. The SOD authorizes the issuance of WVU and WVU Research Corporation pcards to appropriately trained employees who are tasked with making purchases for their departments and/or centers. In addition to annual refresher training as required by WVU Procurement Card Administration, most card holders also attend monthly meetings with the Chief Business Planning Officer during which reinforcement of responsibilities and clarification of rules takes place. These individuals are known as the Cardholders. The chart below details the roles and associated responsibilities:

ROLE	RESPONSIBILITY
HSC Oversight	Overall monitoring & oversight of the Pcard Program-HSC
SOD Oversight/Chief Business Planning Officer & Administration	SOD Overall monitoring & oversight of the SOD Pcard Program
Departmental Card Coordinator (DCC)	<p>Complete training, Enforce Policy & procedures, Administrative, Documentation & Reconciliation, monthly statement processing, Review of individual transaction receipts to ensure:</p> <ul style="list-style-type: none"> • Receipt is itemized & legible • Appropriate business purpose is provided • Cardholder signature with date • Expense is allowable • Additional required authorization as needed <p>Log into MyExpenses to ensure proper accounting codes have been assigned to each transaction by on a weekly basis:</p> <ol style="list-style-type: none"> 1. Cardholder transacts 2. Cardholder uploads receipts and assigns business purpose and approves 3. Supervisor/approver reviews to ensure expenses are allocable, allowable and reasonable, then approves transactions 4. EBO reviews transactions, expense allocation and approves.
SOD Reconciliation & Audit/EBO & Accountant	Reconcile/review/audit

Supervisor/Chair or PI	Ensure Policies & Procedures are followed, notify SOD oversight of any misuse, abuse or fraud, review, sign all monthly statements for cardholders, ensure each transaction is within approved budget, allocable and reasonable.
Cardholders	Complete training, Comply with pcard and procurement policies & procedures, supply proper documentation, ensure security of pcard and pcard information, notify vendors of tax exempt status, upload receipts and other required documentation** to MyExpenses within 3 business days of the date the goods were received, notify DCC of any funding changes via email the day of the purchase, review/approve transactions, report any misuse, abuse or fraud*** to DCC, ensure a business purpose is provided and documented for every purchase, contact vendor to resolve any disputes and complete the dispute process, contact bank for unauthorized transactions + notify DCC

****REQUIRED DOCUMENTATION INCLUDES THE FOLLOWING:**

- Itemized, legible receipt containing the vendor’s name and location.
- Definitive, appropriate business purpose.
- Additional documentation as required (travel authorization, hospitality form, etc.).

*****EXAMPLES OF CARD MISUSE AND ABUSE**

- Failure to maintain security protecting your PCard and/or card information.
- Paying for items for which the PCard is not authorized.
- Using the PCard to violate Procurement policies and procedures.
- Purchase of authorized goods or services, at terms (e.g. price, quantity) that are excessive.
- Failure to provide required documentation upon request by PCPS PCard Administration.
- Card delegation.
- Failure to obtain required authorization prior to purchase.

Certain expenditures are not permitted or require additional approvals when using a pcard. They are detailed below:

UNALLOWABLE	REQUIRES ADDITIONAL APPROVAL
Alcohol <i>(exception may be granted for WVU Research Corp cards only by advanced approval from WVURC treasurer before charges are incurred.)</i>	Agreements/Contracts (must have PCard Administration Approval via emailing: PCardAdministration@mail.wvu.edu)
Live Animals	Association Dues/Memberships <i>See Policy:</i>

	Purchases that are Not Permitted PCPS West Virginia University *see procedures link at end of SOG 014
Cash	Gift or Debit Cards <i>(in accordance with grant restrictions if applicable and must have PCard Administration approval via emailing: PCardAdministration@mail.wvu.edu)</i> <i>Once received, gift cards must be kept in a secured, locked location until distributed. A log of who received each card and for what purpose must be maintained and then turned in to the DCC to be stored with other supporting documentation.</i>
Construction	Hospitality <i>(Please see SOG 0012)</i>
Personal Items/Gifts	
Fuel <i>(for personal vehicles)</i>	
Hazardous Materials	
Meals & Personal Expenses <i>(including when on business travel)</i>	
Radioactive Materials	
State encumbered POs	
Weapons, firearms, ammunition	

When using a pcard to make a purchase, the following steps and/or processes are to be followed according to the role of the individual listed:


ROLE	STEPS AND/OR PROCESSES
Cardholder	Place orders via in person, phone, mail, fax, or secured internet site (indicated by a closed “lock” at the bottom of the screen) in accordance with SOD Purchasing Hierarchy and applicable approval process, email any funding changes same day as purchase to DCC, gather documentation, and sign as “received” on receipt. Once the charge is posted in the cardholder’s eWallet in MyExpenses, they must reconcile within 30 days.
DCC	Review/manage daily funding mapping in MyExpenses, make funding changes as necessary, ensuring all documentation, etc. is in place.
Chairperson or PI	Review and approve individual transactions in MyExpenses. Report any misuse, abuse or fraud.
EBO/Accountant	Perform periodic reviews and monthly reconciliation of all card activity.

**THE WVU PCARD MANUAL IS LOCATED BEHIND THIS SOG FOR
MORE INFORMATION.**

procurement.wvu.edu/rules/rules (Rules and Policies)

***link below covers processes for paying for memberships/dues:**

procurement.wvu.edu/employees/payments/guidelines (Guidelines)

SCHOLARSHIP PROCESS	SOD SOG 011
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The School is fortunate and grateful to have generous donors who believe in assisting dental and dental hygiene students with the cost of their education. Several accounts exist in the WVU Foundation with various criteria reflecting this commitment. The following represents the process by which those funds are distributed.

Recipient Selection

Scholarship selections are made by a committee appointed by the dean and in strict adherence to explicit criteria as per scholarship endowment.

Selection Committee

The Dean will appoint a committee and committee chair charged with the following responsibilities:

- Convene to review available scholarship funding (list of scholarships attached)
- Committee Chair and support staff develop confidential scholarship ballots to include names of all eligible students as per criteria specified in the endowment (such as demographic, academic and community service data)
- Request relevant academic information from Associate Dean for Academic Affairs
- Request from Financial Aid information relative to student financial need
- Request community service report from Dental Practice and Rural Health
- Determine eligible students
- Select recipients based on criteria stipulated in the endowment
- Consult Development Officer regarding donor's wish to award one or more scholarship(s) when spendable amount is large enough to cover more than one scholarship annually.
- Communicate student selections by scholarship fund to Dean's Office

Please note that the Administrative Assistant for the Assistant Dean, Student & Alumni Affairs, will manage the logistics of arranging meetings of the scholarship committee.

Distribution of Scholarship

Dean's office staff will complete the following steps to ensure that funding is distributed appropriately:

- Communicate with Financial Aid regarding eligibility
- Process applicable waivers through existing channels
- Process applicable scholarship amounts through existing channels
- Communicate any complications or changes back to the committee as needed

Notification of Scholarship

Committee Chair aided by his or her staff provides:

1. Written notification to individual scholarship recipients
2. Scholarship recipient roster to SOD Development Officer for purposes of coordinating personalized acknowledgment notes to donors from recipients (please be aware that blank 'thank you' notes are available in the Dean's Office)
3. Scholarship recipient names, ID numbers, and scholarship amounts to
 - HSC Office of Financial Aid
 - Dean's Office
4. Notification to SOD communication/marketing director for potential promotional/public relations opportunities such as press release to scholarship recipients' to hometown newspapers

Scholarship Recognition Program

- The Office of Admissions, Recruitment and Access will have primary responsibility for planning and implementing the annual Scholarship Recognition Program (SRP).
- SRP will include all scholarship recipients, SOD faculty, staff affiliated with scholarship selection, and donors to be determined in consultation with the Dean and Development Officer (consult with development on which would be appropriate)
- Funding for event will be included in the Office of the Associate Dean for Admissions, Recruitment and Access budget

Celebration of Donors

- The Office of Philanthropy encourages a separate donor event which achieves the following objectives:
 - Recognizes scholarship donors and expresses appreciation in a highly personal way
 - Demonstrates impact of the donors' investment by providing an opportunity and environment conducive for one-on-one, engaged conversation with the scholar(s) directly benefitting from their support
 - Provide an opportunity to hear from other scholarship donors and scholars during a program focused on scholarship importance and impact
 - Contribute to donor engagement and connectivity to continue growing the donor's relationship with the School
- The Office of Philanthropy/Donor Relations will have primary responsibility for planning of the annual Scholarship Donor Recognition event.
- Scholarship donors will be invited to the Scholarship Donor Recognition as determined by the Associate Director of Donor Relations and the School of Dentistry Director of Development.
- Once donor RSVPs are received, the corresponding scholar for the donor/scholarship will be invited to attend. In the student invitation correspondence, verbiage will be included as to why they have been selected to be invited (the donor for their particular

scholarship will be in attendance). Other expectations will be outlined including scholar arrival time, tips for engaging with the donor, proper attire and other details.

- An invitation to the Scholarship Donor Recognition event will also be extended to key scholarship contacts such as financial aid counselor(s) who were heavily involved in awarding and faculty and leaders from the School of Dentistry, in consultation with the Dean.
- The Office of Philanthropy/Donor Relations will work with the Dean's office for scheduling the Scholarship Donor Recognition event. Typically, a dinner is held in the fall semester. Considerations for scheduling and selecting the event location include other School events, CE courses, home football weekends and parking, and Visiting Committee meetings.
- A budget for the Scholarship Donor Recognition event will be prepared in advance and submitted by the Associate Director of Donor Relations for expenditure pre-authorization from the Dean's office.
- Scholarship donors should also be provided with the opportunity to attend the Scholarship Recognition Program ceremony in the instance that they have a scheduling conflict for the dinner event or wish to be further involved in scholarship-related functions at the School of Dentistry.