


Business Purpose Guidelines

The business purpose should clearly be defined and demonstrate the use of the good or service in support of the University's mission.

 Some items are prohibited and may require a different funding source other than State Funds.

Think of:

- Who? List names of staff, faculty, students, or affiliates in connection with the good or service.
- What? Define what was purchased.
- When? Include a timeline or, if applicable, the date of the event.
- Where? Include the location of the event or location of where the good purchased will be used or stored.
- Why? Explain why this good or service supports your daily operations and the University's mission.

Here are general guidelines to help you define your expenses:

For the Business meal

- You will need to identify the specific purpose, and this can include meal donor or required meal during the university event.
- List the timeline, attendee's names, and their affiliation to the University.
- This typically includes CSUF guest.
- If meal or food purchases occur during breakfast, lunch, or dinner, identify the reason why the meeting could not be done during regular business hours.
- If it's for University employees only, identify the reason for food.
- Food at staff meetings will require VP approval.
- Typically, two-person employees only are prohibited meals.
- Directive 11 will be required when the expense is itemized.

For the Team/morale-building activity

- You will need to identify the specific purpose, list the attendees, and identify the facilitator.
- The purpose should have a University mission-related purpose and not just to get together to provide food or refreshments.

- Directive 11 may be required when the expense is itemized if food was purchased.
- A not allowable business reason is personal events for example, holiday parties, birthdays, baby showers, or retirement under 5 years.

For an Event/Workshop expense

- If hosting the event, identify the event title, date, reason for the event, list the attendees and facilitator.
- Meals would follow the same business meals process that was previously mentioned.
- If attending the event, identify the event title, date, and reason for the event.
- Directive 11 or the Q number may be required when the expense is itemized.

For Gifts or Personal Items

- These items are NOT allowed for birthdays, baby showers, or holidays.

For Promotional items

- Identify a specific purpose or use of items.
- List recipients of items and, if applicable, identify the event title that items will be distributed at.
- Directive 11 will be required when the expense is itemized.

For Office Supplies

- Provide a reason for why it was not purchased at Staples, as it is CSUF's preferred supplier.
- Identify the specific purpose and use of supplies, such as an event or replenish supplies for who or what organization.
- You will also need to provide who will receive or use the item.
- It is prohibited to purchase personal gifts or birthday cards for staff only.

For Awards

- Identify the recipient and affiliation to the University.
- Directive 11 will be required when the expense is itemized.

For IT hardware

- Identify the specific purpose or use of hardware.
- Include who will use the purchased item, list their names and locations for use.
- IT authorization number will be required when the expense is itemized.

For Membership

- Identify specific purpose or benefit to the University.
- Identify if it's an individual membership and lists the individual's name(s).
- Membership Justification Form will be required when the expense is itemized.

For Online Training


- Identify a specific purpose, examples include professional development, required course for a position, license renewal, compliance training, or certification requirements.
- List the names of training attendees.

For Facility Rental

- Identify specific purpose, event details, list the location and # of attendees.
- Q number may be required when the expense is itemized if location is offsite and/or agreement was signed.

For Subscription

- Identify the specific purpose or use of the subscription.
- Identify who will use the subscription.
- How it will benefit the department/university.
- If the subscription is one-time or part of a renewal.
- IT authorization will be required when the expense is itemized.

 Transactions that do not clearly define the business purpose will be returned to the cardholder.

If you are unsure of how to define an expense, please reach out to ebusiness@fullerton.edu to help you identify the business purpose before submitting the report.