

220.00 – Retirement Recognition Expenditures

Refer:

- Multnomah County Financial Administrative Rule FIN 4

Definitions:

- Allowable Expenditures - Purchases that are approved under County administrative rule FIN-4, further defined in this policy, applicable for MCSO.
- Authorized Location - Events for which County funds will be spent must occur at a County-owned facility or property.
- Event Supplies - Includes disposable food serving supplies such as cups, plates, flatware, napkins and tablecloths. Event supplies also include printing costs if the organizers opt to produce a reception program.
- Light Refreshments - Light snacks and beverages such as fruit and vegetable trays, cake, cookies, pastries, punch, coffee, nuts, and if the event spans a meal period, can include more substantial offerings such as cold cut deli trays or pizza.
- Rank - The position that a sworn member has held at the time of their retirement, synonymous with 'position' held by non-sworn members.
- Recognition Gifts - Includes recognition plaques, framed documents or photos related to MCSO, or shadowboxes with items honoring the member's career with the County.
- Spending Authority - Dollar thresholds for allowable purchases, as set by this policy, which are the total amount of County funds that can be spent on the event.
- Years of Service - Total period of time that the member has worked for MCSO through the date of their retirement.

Policy:

1. Appropriately recognizing members' years of service to an organization is of significant and symbolic importance. Honoring a Multnomah County member at the end of their successful public service career at a retirement function is a prudent expenditure of public funds to recognize their service, commitment, and dedication to the organization and the public they have served. These functions are also important morale-building events for the retirees' colleagues in attendance as there are team-building and networking opportunities and they often include critical interaction with representatives of other agencies in attendance. In order to establish clear guidance and consistent standards regarding retirement event expenditures, MCSO is enacting this policy.
2. This policy defines allowable levels of spending and allowable expenditures related to member retirement recognition events. The policy will provide clear guidance to those members who initiate and/or authorize purchases, defining the allowable and the explicitly prohibited expenditures for the recognition and celebration of our members' service at the time of retirement.
3. Agency-wide Recognition receptions for retiring members should be limited to the following refreshments

as defined below:

3.1. Event supplies.

3.2. MCSO recognition gifts.

3.3. Total event expenditures including light refreshments, event supplies, and recognition gifts, not to exceed \$300. The Sheriff has the authority to approve reception expenditures of up to \$400 in the event that one hundred (100) or more attendees are anticipated.

4. It is acknowledged that this policy does not address all considerations of retirement event expenditures, and therefore, if additional guidance is needed, a memo or email can be submitted to the Chief of Business Services with the question or issue that needs resolution or clarification. The Chief of Business Services will evaluate the question and provide a response and direction within five (5) days.

Procedure:

1. Retirement event spending caps are based on criteria of years of service and rank of the member at time of retirement. If when determining the appropriate spending levels for a member's retirement event, the years of service and rank/position criteria are in conflict, the greater of the two (2) spending allowances will prevail. The spending thresholds are as follows:

1.1. Spending Thresholds by Years of Service:

1.1.1. The allowable expenditure level for a member who has worked for MCSO for fewer than ten (10) years is \$200.

1.1.2. The allowable expenditure level for a member who has worked for MCSO for ten (10) years or longer is \$300.

1.2. Spending Thresholds by Rank:

1.2.1. The allowable expenditure level for members who retire in the rank of Chief Deputy, Chief of Business Services, Human Resources Director, Chief of Staff, and Commander is \$300. The allowable expenditure level for the Sheriff is \$500 due to the expectation of large numbers of event attendees, both internal and external to the agency.

1.2.2. All other ranks and positions not specified by 'spending thresholds by rank' will default to the guidance articulated by years of service.

1.3. Specific Unallowable Expenditures:

1.3.1. Unallowable expenditures include, but are not limited, to the following:

1.3.1.1. Sit down meals, box lunches, and buffet meals

1.3.1.2. Gifts aside from personalized recognition awards and mementos of MCSO service

1.3.1.3. Alcoholic beverages

1.3.1.4. Expenditures for live entertainment

1.4. Work Units will initiate the plan for a retirement celebration by submitting a memo for approval to their respective Division Chief or Sheriff (Chief Deputy, Chief of Business Services, or Sheriff).

1.4.1. The memo will include: estimated cost, estimated number of people, food and beverage items that are planned to be served, location, general event agenda/program, hours and date of the event, and business purpose of expense demonstrating benefit to the agency. The memo should also include a list of anticipated non-MCSO guests.

1.5. The Division Chief or Sheriff will evaluate the proposal and respond to the request within five (5) days either with approval, denial, or requesting more information.

1.6. Upon approval of the proposal, the work unit members will execute their plan in accordance to the proposal. Deviations to the proposal must be submitted to their respective Division Chief or Sheriff with an explanation of the change, with the intent of soliciting approval in advance of the event, whenever possible.

1.7. Members are required to adhere to the spending guidelines within this policy and not doing so could result in disciplinary measures.

History:

- Originating Policy and Procedure: 6/15/20
- Next Review Date: 6/15/22
- Review By: Fiscal Department