

**To:** Chancellors, Vice Chancellors, Deans, Directors, and Fiscal Officers

**From:** Neil Theobald, VP and CFO

**Date:** August 18, 2011

**Subject:** Processing fees for Indiana University conferences and events

The following policy applies to all campuses of Indiana University.

As of September 1, 2011, all departments, schools or centers who host any conference, non-credit program, professional development activity, or any event for which funds are collected and deposited into a university account must use the Office of Conference and Event Registration Services for the **collection and processing of fees**. Events that are currently registering, or will occur before October 1, will be exempt for this first year only.

It is the intent of this policy to give you information that you need to manage your programs, while removing you from the responsibility of physically handling revenues and the liabilities associated with doing so.

This policy was successfully implemented in July of 2010 on the Bloomington campus. It is in response to IU Internal Audit findings that our systems for receiving participant fees do not comply with requirements set out in Office of the Treasurer Policy VI-120. They found that current practices increase Indiana University's exposure to loss via fraud or fines and penalties for data security/PCI DSS breaches, and result in lost income from delayed processing.

The Office of Conference and Event Registration Services and the Office of the Treasurer have invested significant time and effort into refining the most cost-effective and compliant solution for receiving these payments. The service meets all the requirements to comply with Payment Card Industry Data Security Standards (PCI-DSS and PA-DSS), and has been thoroughly vetted.

There is a cost of compliance with university and industry standards, but it is much less than the cost of non-compliance. I consider the fees associated with this service to be reasonable and should be factored into your program budgets. Information on this service, fees, and how to get started can be found at **[www.ocers.indiana.edu](http://www.ocers.indiana.edu)**.

If you have any questions about this policy, please contact Rozzie Gerstman (Assistant Vice President - Finance), Kevin Knerr (Director of IU Conferences and the Office of Conference and Event Registration Services), or Ruth Harpool (Office of the Treasurer).