



UNIVERSITY OF WASHINGTON

FOOD AND BEVERAGES FOR MEETING, TRAINING SESSIONS AND RECOGNITION AWARDS CEREMONIES

FINANCIAL SERVICES

Complete this form and obtain approval before meals or light refreshments are to be served at a university meeting, formal training session, or formal recognition event. Please use object code 03-75 on payment documents. This form should be completed and approved prior to the event. For additional guidance, please refer to the Policy for the Purchase of Meals and/or Light Refreshments issued by the Executive Vice President on May 1, 2000.

Event Date	Event Title			
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Purpose of Event Meeting (Official UW business will be conducted; meals/light refreshments are integral to the event.) Training (Official UW business will be conducted; meals/light refreshments are integral to the event.) Recognition (Light refreshments are integral to recognition of UW employees/students.)

Sponsoring Department	Budget Number
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Department Contact Name	Contact's Phone Number ()
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Total Number of Invitees <input type="text"/>
(Maintain a list of attendees or invitees in department.)

CHECK LIST

Meals will be served.*

- Breakfast
- Lunch
- Dinner

*The cost per meal may not exceed the applicable per diem, including tax and gratuity, for the location in which the meal is served.

Light refreshment will be served.

Estimated cost of refreshments \$ _____

Event will be recurring.**

Name of Meeting/Training Coordinator. PLEASE PRINT.	Signature of Coordinator	Date
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** Approved form may be copied for future recurring events.

APPROVAL

Name of Approving Official. PLEASE PRINT.	Signature of Approving Official	Date
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University of Washington

Policy and Procedure for the Purchase of Meals and/or Light Refreshments for Meetings, Training Sessions and Recognition Awards and Events

May 1, 2000

INTRODUCTION

The Washington State Office of Financial Management permits University funds to be used to purchase meals and light refreshments for employees, students and official guests who are attending meetings or formal training sessions and to purchase light refreshments served in conjunction with recognition award presentation ceremonies. Deans and Vice Presidents are delegated authority (further delegation is limited only to Directors and Chairpersons and must be made in writing) to approve such expenditures for their respective organizations in accordance with this policy and procedure. This policy expands to types of budgets which may be used for food purchases related to meetings, training sessions and recognition of employees and students. The policy does not replace authorizations for budgets on current food lists.

APPLICABILITY

The policy described in this document apply to meals and light refreshments purchased from University funds (e.g., state, grant or contract *, non-discretionary gifts, self-sustaining, Services and Activities Fee income) for specific situations not generally covered by the existing food and beverage policy for authorizing budgets to incur food and beverage expenses. This policy will complement, but not entirely replace, the existing policy.

* *Grant, contract, or other sponsored project funds may not be used if the sponsor regulations or specific agreement guidelines prohibit the purchase of food for the purposes covered by this policy.*

POLICY

Departments are authorized to purchase meals and light refreshments served to employees, and official guests (includes students and other non-employees integral to the purpose of the event) in conjunction with meetings, formal training sessions and employee and/or student recognition events in accordance with the conditions specified in this document.

Student government/organizations are authorized to purchase, using Services and Activities Fee income approved by the applicable student governing organization, meals and light refreshments served to students and official guests (includes non-students integral to the purpose of the event) in conjunction with meetings, formal training sessions (not associated with instructional activities) and recognition events in accordance with the conditions specified in this document.

Conditions for Meetings or Training—All of the following conditions must be met:

- The meal or light refreshments must be an integral part (e.g., a lunch speaker; obtaining meals away from the meeting location is disruptive to event continuity, etc.) of an official University meeting or formal training session, and
- Attendance by the individuals(s) is advantageous to the UW, and,

- The purpose of the event must be to conduct official UW business or to provide formal training to UW employees or non-instructional training to students, and,
- The meeting or formal training must be conducted at a location away from the place where the employee normally performs his/her work (e.g., his/her desk or cubicle). Acceptable locations include meeting and conference rooms which may or may not be in the building where the employee normally performs his/her work.

Conditions for Recognition Events The following *two* conditions must be met:

- The event must include the formal presentation of a recognition award to one or more employees or students. Examples of accomplishments worthy of formal recognition may include successful completion of an extraordinary special project, acknowledgment of official University individual employment milestones (10, 15, 20, 25,30, 35 years of service) or other outstanding achievement.
- Only light refreshments may be served at the event.

Cost Per Meal

The expenditure or reimbursement using University funds may not exceed the applicable travel per diem limit for the meal (including taxes and customary gratuity) provided at the location of the meeting.

Refer to <http://www.washington.edu/admin/travel/meals> for current per diem rates.

Cost of Light Refreshments

For recognition of employees, the total amount expended per recognition award, *including* light refreshments, is limited to the monetary level authorized in RCW 41.60.150 (\$200 per individual and/or group receiving recognition). For example, if individual awards are presented to members of a team, the amount expended is limited to \$200 per individual. Food served at a recognition event is restricted to light refreshments *unless* the actual recognition award is a meal. When a meal is the award, the amount of the meal per individual being recognized is not limited to the applicable per diem rate. However, only the meal expense for the individual(s) being recognized may be paid using University funds; the cost of meals for other attendees not being recognized must be charged to a discretionary funding source.

Non-allowable

The cost of meals or light refreshments *may not* be supported by University funds when the purpose is to conduct one of the following types of activities:

- Normal daily business of university employees (e.g., daily coffee, etc.)
- Regularly scheduled staff, faculty, or student government/organization meetings
- Anniversaries of units
- Open house events

- Receptions for new or existing employees (except as provided for in this policy)
- Hosting, entertaining or social activities (other than formal recognition events)

The cost of meals or light refreshments for the above may be purchased from discretionary funding sources (64-XXXX or from any budgets authorized for these purposes on the existing food and beverage lists). In addition, purchases of alcoholic beverages may only be purchased from discretionary funds.

Note: Food purchases for the following activities are not permitted on any University funding source, including discretionary funds:

- Lobbying a legislator or governmental official
- Elections or election celebrations

Prior Approval

An expenditure under this policy must be approved *in advance* by the responsible Dean or Vice President (Director/Chairperson with written delegation from the Dean or Vice President). The approval will be documented by a completed U of W Form 1798, Food and Beverages for Meetings, Training and Recognition Awards and submitted as per the implementing procedures for this policy (issued May 9, 2000). U of W Form 1798 is available at <http://www.washington.edu/admin/ap/office/forms.html>

Note:

- For specific, recurring events, such as a training sessions, U of W Form 1798 need only be completed once prior to the initial event and copied for future events.
- Expenditures using discretionary funds or funding sources on the existing Food and Beverage Lists are not required to complete U of W Form 1798.

PURCHASING PROCEDURES

Payment Or Reimbursement

A department may directly pay the provider of the meals or light refreshments or reimburse an employee for the food and beverage expenses incurred. Expenditure code to be used for all payments or reimbursements is 03-75. Lists of attendees or invitees must be maintained by the department.

Direct Payment of Off-Campus Provider

The department may directly pay an off-campus provider (vendor) of meals or light refreshments by using the following procedures:

Total cost of meals or light refreshments (including taxes and customary gratuities) will be less than \$3,000:

- Prepare and submit a Confirming Purchase Requisition with the attachment designator marked and provide vendor with requisition number.
- Obtain an invoice for the meals or light refreshments provided from the vendor.

- Submit the vendor invoice, along with the approved U of W Form 1798, as an attachment to the Purchase Requisition.

Total cost of meals or light refreshments (including taxes and customary gratuities) will exceed \$3,000:

- Prepare and submit a Purchase Requisition with the attachment designator marked.
- Submit the completed U of W Form 1798 to the Purchasing Department, Box 351115, as an attachment to the requisition.
- Coordinate with the assigned Buyer in Purchasing regarding selection of the off-campus provider. Purchasing places a purchase order with the vendor who will provide the meals or light refreshments.
- Vendor submits an invoice for the meals or light refreshments provided to Accounts Payable as indicated in the purchase order.

Direct Payment of On-Campus Provider

The department may pay on-campus providers of meals or light refreshments directly by using the following procedures:

- Place an order for meals or light refreshments directly with the on-campus provider, indicating that an approved U of W Form 1798 will be provided.
- After the meals or light refreshments have been provided, the on-campus provider will charge the budget cited on the U of W Form 1798 by Internal Sales Document, Cost Transfer Invoice or Journal Voucher.

Reimbursement of Employee

Total cost of meals or light refreshments (including taxes and customary gratuities) is \$200 or less:

- Employee submits receipt from vendor providing the meals or light refreshments, together with a Petty Cash Voucher and the approved U of W Form 1798 to the Purchasing Department Petty Cash Window or to Departmental Revolving Fund Custodian in accordance with procedures in Operations Manual D52.4 or D35.4 respectively.
- Total cost of meals or light refreshments (including taxes and customary gratuities) is greater than \$200 and less than \$3,000:
- Complete a Purchase Requisition with attachment indicated in the requisition.
- Prepare a University of Washington Invoice Voucher/Receiving Report, U of W Form 1730, to substantiate reimbursement to the employee in accordance with Operations Manual D35.5.
- Attach receipt from vendor and the approved U of W Form 1798 to the Invoice Voucher and submit all as an attachment to the Purchase Requisition and route to the Purchasing Department, Box 351115.

Questions regarding this policy and the associated procedure may be directed to Ann Anderson at andera@u.washington.edu or 206-543-8813.